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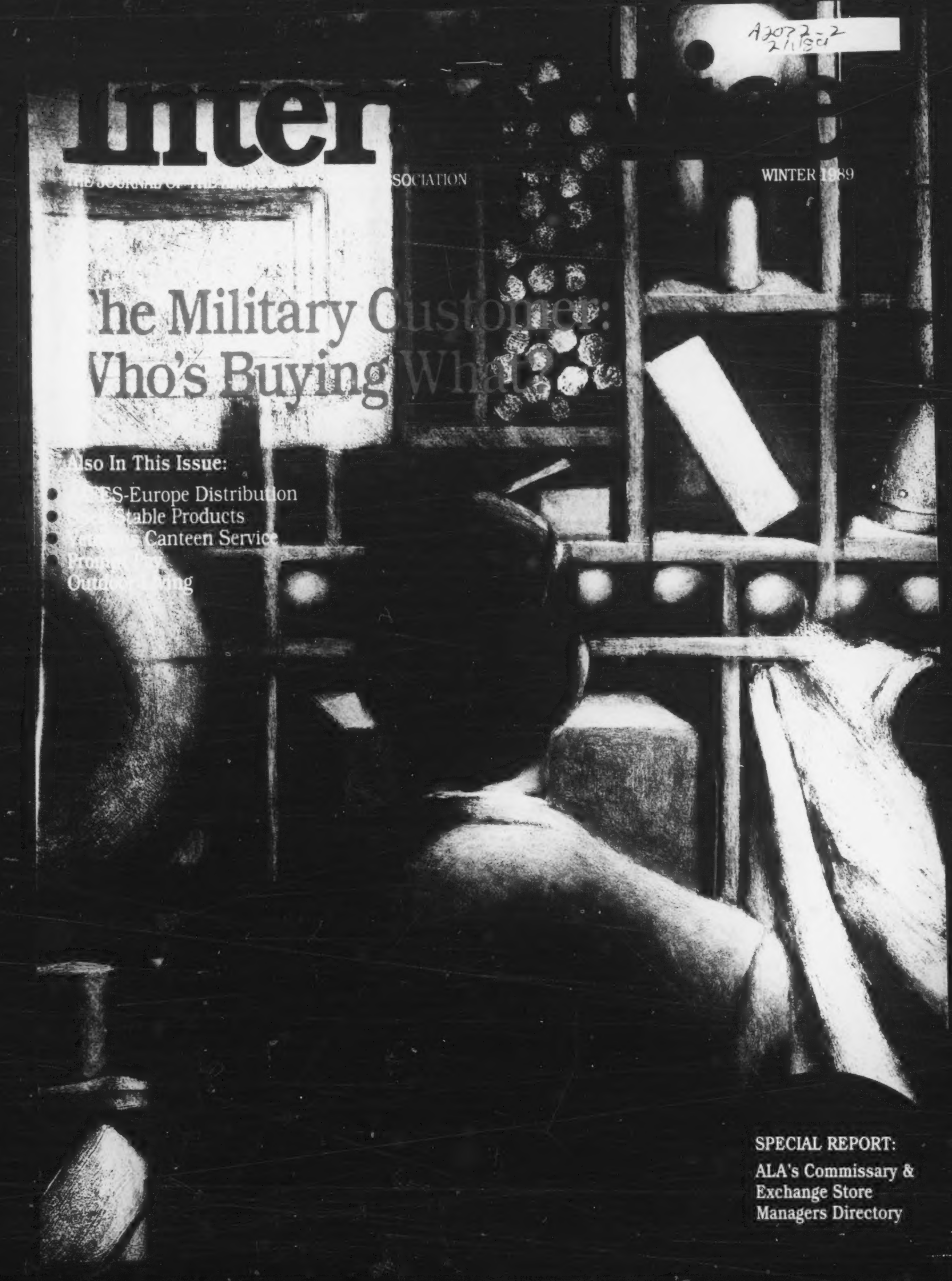

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SPECIAL REPORT:
ALA's Commissary & Exchange Store Managers Directory

PUBLISHED BY THE AMERICAN LOGISTICS ASSOCIATION

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The Military Customer: Who's Buying What?

BY SANDY EVANS

Almost $14 billion was spent in commissaries and exchanges around the world in 1988, representing only a portion of the purchasing power of the 2.2 million active-duty personnel plus their dependents, 1.2 million civilian military employees, and 1.5 million retirees. With a combined total income estimated at $163 billion, this market definitely deserves the attention of astute commissary and exchange managers.

"The military is the only market in the country that has no recession, no unemployment and no pay cuts," says Nat Kornfield, vice president and advertising director of the Army Times Publishing Company, the New York-based publisher of the national Army, Navy and Air Force Times newspapers. Yet it is a difficult market to target, because there is a wide range of customers that has to be satisfied.

"It is as though you have to represent all stores in all shopping centers in all cities to appeal to all our different customer types," explains R. Lee Phillips, assistant head, Retail Operations Branch Headquarters of the United States Marine Corps. "From the 17-year-old recruit to the four-star general and his wife—they all shop here."

Most commissaries and exchanges must try to be all things to all people. However, there are three key customer segments that represent the largest chunk of sales and are targetable for specific promotions and analysis of trends. These are young single men and women (under 25), young families, and retirees. These categories mirror major purchasing groups in the private sector. The lifestyle changes occurring in society—the two-career families, the growing importance of the senior market—are also mirrored on military bases, providing new challenges for military marketers.

The Numbers

According to military sources, the U.S. Army, Navy, Air Force, Marine Corps and Coast Guard have nearly 1.7 million officers and enlistees stationed at more than 250 installations across the country, with another 500,000 servicemen and women overseas. About 55 percent of all military personnel are married—base communities include 1.2 million spouses and 1.7 million children. Just under 80 percent of all military families live off-base.

The average income for an active-duty military person is about $30,000. The average enlistee makes $18,000; food, clothing, shelter and entertainment are all provided as part of the package. The armed forces maintain an active-duty payroll of $35 billion as well as a civilian payroll of $25 billion. Figure in the earnings of spouses, and that adds up to a lot of disposable income.

Young and Mobile

The military market is largely educated, male, young and mobile, according

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to Department of Defense statistics. Almost 90 percent of all personnel are male, and 96 percent are under age 39 (35 percent are between 21 and 25 years old). Every year, 300,000 to 500,000 men and women leave the service for civilian life and just as many new enlistees take their place. Within the military, families move frequently as assignments change. These features create within the military one of the most important youth markets in the country—and one of the most difficult to target.

Because military personnel are so transient, they're difficult to reach through direct mail or other conventional marketing means. Many suppliers agree that the best way to reach this market is often through military and base newspapers and magazines. Using these publications and on-site efforts, many marketers have found that this audience is responsive to sweepstakes, cents-off coupons, point-of-purchase displays and sponsored on-site activities.

And what products attract the most attention? Brand names, first and foremost, particularly in electronics, gadgets, and designer clothes.

Young military personnel reflect the trends and buying patterns among their civilian counterparts in certain respects, comparable in many ways to the college market. They tend to be image-conscious, prefer brand names, and like to emulate their peers. According to a recent *Gentleman's Quarterly* poll (March 1988), most men care about the way they look and work at it. Two-thirds said that looks represent a person's identity, and almost half said looks—not brains—were what interested women.

This attitude is reflected in the young military shoppers' buying patterns. From Ray Bans to designer clothes to BASF stereos to Rolex watches, these young consumers seek out top-quality brand name items and buy them, often paying little attention to cost. In 1987, over $80 million was spent on watches alone in exchanges.

Young and transient, with significant disposable income, this large segment of the military market represents a group that is growing in the nation as a whole. Known as the Baby Busters—those born between 1965 and 1974—this group shares certain distinguishing traits, according to a report in the May 1988 *Stores Magazine*, the publication of the National Retail Merchants Association. *Stores* describes baby busters as valuing traditional rituals, such as proms and lavish weddings; they are often preoccupied with success in school and careers; and, as a whole, they are very materialistic.

Focus on Fun

These characteristics are borne out by a look at the most popular items with the young military. Stereos and electronics rank very high, as do purchases from "concept shops"—boutique-type departments in exchanges that present a particular designer label of clothing (usually sportswear). Maureen Murray, public affairs specialist, NAVRESSO, notes that Esprit, Liz Clairborne for men and women, and Generra—a casual men's wear line—are especially popular on the Navy bases. She also points out that just as the military is similar in many respects, so too does it have its unique aspects.

ACTIVE DUTY

Army	768,211
Navy	581,759
Marine Corps	197,127
Air Force	594,660
Total DoD	**2,141,757**
Coast Guard	38,474

*As of March 31, 1988
Source: DoD

GUARD & RESERVE

Army	1,061,148
Navy	240,609
Marine Corps	89,214
Air Force	268,392
Total DoD	**1,659,363**
Coast Guard	18,436

Does not include retired reserves
*As of March 31, 1988
Source: DoD

"The Naval Training Center in Great Lakes, IL is largely young single men," relates Murray. "One of the most popular hobbies there is the racing of remote controlled cars—these cars cost over $100 each. Naturally, we stock a wide selection of these cars at this particular base. This is a good example of our efforts at stocking merchandise to meet our particular customers' needs."

Camp Pendleton, in California, home base to largely younger Marines, takes the concept of catering to its major audience one step further. The USMC's R. Lee Phillips notes that

Camp Pendleton has created a whole store devoted to electronics, and another store devoted strictly to sporting goods.

Favoring Families

Nearly 55 percent of military personnel are married. The military traditionally holds family-oriented values, exemplified by the fact that the birth rate in the military is almost twice that of the national average. And these families are largely young: almost 70 percent of active duty dependent children are 9 or under, and almost 60 percent of military wives are between 20 and 29 years of age.

Over 50 percent of the families have two incomes—and a large chunk of those incomes are spent on kids. Nearly $360 million—over 5 percent of total exchange sales—was spent on infant, toddler, and kids wear and toys, games and bikes.

Just over 10 percent of military personnel are women; this population combines with the over 50 percent of military wives who work to make career women an important market on military bases. According to 1986 data researched and distributed by management consultants Kurt Salmon Associates and the NPD Research Group, working women tend to spend a third more on clothes than non-working women.

A study of women from 18 to 64 years of age commissioned by Lifetime Cabletelevision Network and conduct-

OFFICER, ENLISTED TOTALS

	ARMY	NAVY	MARINE CORPS	AIR FORCE	TOTAL DoD
Officers	107,907	71,261	19,834	107,207	306,209
Enlisted	656,047	505,021	177,293	483,109	1,821,470
Academy Cadets	4,257	5,477	—	4,344	14,078
TOTAL	**768,211**	**581,759**	**197,127**	**594,660**	**2,141,757**

*As of March 31, 1988
Source: Defense Manpower Data Center

WOMEN IN UNIFORM

	Officers		Enlisted	
	No.	Pct.	No.	Pct.
Army	11,578	10.7	71,717	10.8
Navy	7,219	10.0	45,491	8.9
Marines	641	3.2	8,946	5.0
Air Force	17,769	11.9	63,161	12.8
Total DoD	**32,207**	**10.5**	**189,315**	**10.2**

DMDC
*As of December 1987
Source: Defense Manpower Data Center

EDUCATION

Officers

Below baccalaureate	15,001
Baccalaureate only degree	169,005
Advanced degree	105,353
Unknown	17,976
Total	**307,336**

Enlisted

No high school diploma or GED	50,119
High school graduate or GED	1,660,216
Alternate Education Credential	19,292
1-4 years college (no degree)	61,701
Baccalaureate degree	41,660
Advanced degree	3,001
Unknown	12,936
Total	**1,848,925**

*As of December 31, 1987
Source: Defense Manpower Data Center

MINORITIES IN UNIFORM

OFFICERS	BLACK AMERICANS		HISPANIC AMERICANS		OTHER*		TOTAL	
	No.	Pct.	No.	Pct.	No.	Pct.	No.	Pct.
Army	11,080	10.2	1,595	1.5	2,973	2.7	15,648	14.5
Navy	2,508	3.5	1,324	1.8	1,890	2.6	5,722	7.9
Marines	939	4.7	364	1.8	302	1.5	1,605	8.1
Air Force	5,749	5.4	2,160	2.0	2,668	2.5	10,577	9.9
Total DoD	**20,276**	**6.6**	**5,443**	**1.8**	**7,833**	**2.5**	**33,552**	**10.9**

ENLISTED	BLACK AMERICANS		HISPANIC AMERICANS		OTHER*		TOTAL	
	No.	Pct.	No.	Pct.	No.	Pct.	No.	Pct.
Army	199,200	27.2	27,131	4.1	26,862	4.0	253,193	38.1
Navy	77,580	15.2	23,932	4.7	28,850	5.6	130,362	25.5
Marines	37,031	20.7	10,140	5.7	5,856	3.3	53,027	29.7
Air Force	85,102	17.2	18,435	3.7	16,705	3.4	120,242	24.3
Total DoD	**398,913**	**21.6**	**79,638**	**4.3**	**78,273**	**4.2**	**556,824**	**30.1**

*Includes Native Americans, Alaskan Natives and Pacific Islanders

*As of December 1987

Source: Defense Manpower Data Center

HOW OLD THEY ARE

	ARMY		NAVY		MARINE CORPS		AIR FORCE		TOTAL DoD	
	Off	Enl	Off	Enl	Off	Enl	Off	Enl	Off	Enl
21 and younger	81	145,236	4	102,664	0	51,722	1	69,433	86	369,055
21-25	17,008	237,205	12,152	187,548	3,478	73,834	14,073	173,814	46,711	672,401
26-30	25,746	130,899	17,805	105,580	5,428	29,224	27,283	113,108	76,262	378,811
31-35	24,071	81,415	14,990	60,259	4,490	13,398	23,532	67,801	67,083	222,873
36-40	21,224	49,806	14,568	37,296	3,767	7,697	21,413	51,638	59,972	146,437
41-45	12,579	16,034	8,676	13,573	1,893	2,098	14,808	15,277	37,956	46,982
46-50	5,114	3,907	3,423	3,481	631	551	4,682	2,620	13,850	10,559
Over 50	1,743	463	1,315	593	196	84	1,285	195	4,539	1,335
Unreported	567	397	295	71	2	1	12	3	876	472
Total	**108,133**	**665,362**	**72,228**	**511,065**	**19,885**	**178,609**	**107,089**	**493,889**	**307,335**	**1,848,925**

*As of Dec. 31, 1987

Source: Defense Manpower Data Center

NUMBER OF MILITARY RETIREES

The following table reflects only those retirees receiving retirement pay from the Services.

	ARMY	NAVY	MARINE CORPS	AIR FORCE	TOTAL DoD
For longevity (20 or more years)	408,441	327,173	57,812	474,665	1,268,091
For disability					
Temporary	3,949	4,808	1,288	1,470	11,515
Permanent	55,032	23,697	10,488	37,096	126,313
Total	**467,422**	**355,678**	**69,588**	**513,231**	**1,405,919**

*As of Sept. 30, 1987

Source: Defense Manpower Data Center

AGE DISTRIBUTION OF WIVES OF ACTIVE DUTY MILITARY

Age Group	Number	Percent
UNDER 20 YEARS	118,500	10.1
20-24 YEARS	418,900	35.7
25-29 YEARS	257,000	21.9
30-34 YEARS	217,100	18.5
35-39 YEARS	115,000	9.8
40 YEARS AND OVER	46,900	4.0
Total Wives Of Active Duty Military	**1,173,400**	**100.0**

*As of March 31, 1988
Source: DoD

AGE DISTRIBUTION OF DEPENDENT CHILDREN OF ACTIVE DUTY MILITARY PERSONNEL

Age Group	Number	Percent
UNDER 5 YEARS	460,700	28.0
5-9 YEARS	646,700	39.0
10-14 YEARS	339,900	20.5
15-17 YEARS	134,000	8.1
18-20 YEARS	72,800	4.4
Total Dependent Children	**1,654,100**	**100.0**

*As of March 31, 1988
Source: DoD

MILITARY FAMILIES . . .

	MILITARY PERSONNEL	SPOUSES	CHILDREN	PARENTS OTHERS	TOTAL DEPENDENTS
ARMY					
Officers	107,964	67,068	109,213	9,839	186,120
Enlisted	668,410	307,405	500,232	49,635	857,272
Total	**776,374**	**374,473**	**609,445**	**59,474**	**1,043,392**
NAVY					
Officers	72,038	50,239	71,287	379	121,905
Enlisted	510,208	251,612	328,904	3,443	583,959
Total	**582,246**	**301,851**	**400,191**	**3,822**	**705,864**
MARINE CORPS					
Officers	20,047	15,505	24,914	55	40,474
Enlisted	179,478	74,407	98,067	472	172,946
Total	**199,525**	**89,912**	**122,981**	**527**	**213,420**
AIR FORCE					
Officers	107,338	81,559	117,931	995	200,485
Enlisted	495,244	305,026	374,563	3,453	683,042
Total	**602,582**	**386,585**	**492,494**	**4,448**	**883,527**
TOTAL DoD					
Officers	307,387	214,371	323,345	11,268	548,984
Enlisted	1,853,340	938,450	1,301,766	57,003	2,297,219
Total	**2,160,727**	**1,152,821**	**1,625,111**	**68,271**	**2,846,203**

*As of December 1987
Source: Defense Manpower Data Center

. . . AND WHERE THEY LIVE

LOCATION	ARMY	NAVY	MARINE CORPS	AIR FORCE	TOTAL DoD
Continental United States	818,052	637,603	197,068	710,246	2,362,969
Alaska	13,712	1,476	100	15,108	29,856
Hawaii	15,560	19,648	8,029	9,201	52,438
U.S. Territories/Special Locations	806	8,575	299	5,337	15,017
Foreign Countries	195,802	38,562	7,924	143,635	385,923
Total	**1,043,392**	**705,864**	**213,420**	**883,527**	**2,846,203**

*As of Sept. 30, 1987
Source: Defense Manpower Data Center

ed by Research & Forecasts Inc. found that 47 percent of those questioned felt that dressing fashionably was somewhat important; 26 percent said it was very important. Those under 35 and who worked full-time were the most concerned.

Brand Names

A Fashion Survey of *Mademoiselle* magazine's Career Marketing Board published in 1986, reported that 75 percent of the respondents are influenced by labels in their apparel purchases. The most important information? Name of designer or manufacturer. This trend is mirrored on military bases. NAVRESSO'S Maureen Murray says "concept shop" purchasing is as popular with women as with the young men. Esprit, Liz Clairborne, and Multiples–mix and match separates in jersey material—are among the most popular designers. The Navy is currently testing Benetton in Norfolk and San Diego.

In addition to emphasis on kids and clothes, women shoppers are responsible for houseware items, and microwaves and all their accoutrements are the hottest group in this area. "Microwaves, microwave accessories, and microwaveable products—the entire category—are growing to such an extent that we are creating a separate section in our commissaries," states Mike Hawkins, AFCOMS spokesman. "We see this growth as directly related to the fast-paced lifestyle of our two-career couples."

Stock Up On Electronics

Consumer electronics products are one of the fastest growing product categories across the nation—and the military is no exception. In 1987, 11.4 percent of total exchange sales were spent on electronics. And, according to a recent article in *Fortune Magazine* (February 1987), things are only going to get better.

Fortune **predicts that the 1990s will see continued exuberance and increased sales in consumer electronics. Sales of personal computers are expected to take off. Technological improvements, lower prices, better software, and growing educational uses should drive the market at an average annual rate of nearly 21 percent. Telephone equipment sales could rise 20 percent a year, inspired by convenience items such as cordless phones. If manufacturers succeed in marrying laser disks, computers, and video screens, as many people expect, home entertainment systems could be one of the most dynamic growth markets of all.**

Military personnel have already jumped into this product category with both feet. Currently, the military community owns 6.5 times as many VCRs as the national average—and sales of VCRs and VCR rentals continue strong in exchanges across the country. It seems a natural that the military will participate wholeheartedly in the consumer electronics boom.

The popularity of gadgets, so evident among young male military personnel, spills over into the "young families" category as well, though with a twist—these are usually practical gadgets, that make preparing a meal easier or faster, or in some other way improve domestic chores. For example, according to Major Jim Heaberg, AAFES spokesman, an electric crock pot purchased on a one-time basis took off, and is now stocked year round.

Used for simmering potpourri, the three-inch electric crock pot was first purchased in Fall 1987 for the Southeast region. Marketed as a gift item and priced for under $10, the product sold out in less than three days. "We now stock this item year round, with supply increased around Christmas, and it continues to sell well," notes Heaberg. "This is a good example of listening to our customers, and letting them have input through their actions into what products we carry."

Retirees are Strong

There are almost 1.5 million retirees in the military today—and this number increases by 2.5 percent per year. Currently, almost 37 percent of the military community is comprised of retirees, their spouses and children. In many cases these are individuals who are drawing a military pension and holding civilian jobs or consulting positions . . . a scenario that often results in ample discretionary funds.

Again paralleling their civilian counterparts, retirees have a lot more clout than they used to. A large portion of this community are affluent and active and shop wisely—and often. Over 75 percent of the nation's total financial assets are controlled by the over-50 population—and they hold over half of the country's discretionary income.

With lots of money and time to spend it, this group of purchasers is quality conscious and puts lots of emphasis on service and convenience. According to a study recently published by Meretrends, the consulting service of Retail Planning Associates, they pre-

Where Retirees Live

MAILING ADDRESS	ARMY	NAVY	MARINE CORPS	AIR FORCE	TOTAL DoD
Alabama	17,285	5,420	1,212	12,722	36,639
Alaska	1,675	503	99	2,979	5,256
Arizona	10,702	5,469	1,934	18,185	36,290
Arkansas	6,706	4,087	824	8,871	20,488
California	41,863	85,580	18,849	67,447	213,739
Colorado	13,221	3,844	959	17,433	35,457
Connecticut	3,039	5,032	607	2,259	10,937
Delaware	1,144	697	155	2,774	4,770
Dist. of Columbia	2,646	742	174	1,523	5,085
Florida	36,380	44,332	6,072	54,703	141,487
Georgia	28,731	8,036	2,667	15,790	55,224
Guam	258	606	46	280	1,190
Hawaii	4,809	3,257	800	2,883	11,749
Idaho	1,655	1,709	352	3,400	7,116
Illinois	9,797	6,723	1,601	9,547	27,668
Indiana	7,118	3,373	1,054	5,253	16,798
Iowa	2,934	1,974	465	2,405	7,778
Kansas	6,565	2,366	547	5,554	15,032
Kentucky	10,860	2,538	701	3,943	18,042
Louisiana	8,359	4,510	1,126	11,026	25,021
Maine	2,430	3,200	491	3,246	9,367
Maryland	14,079	10,421	1,651	9,931	36,082
Massachusetts	7,732	6,645	1,323	6,807	22,507
Michigan	8,012	4,597	1,358	7,025	20,992
Minnesota	4,267	3,073	689	3,831	11,860
Mississippi	5,434	4,357	745	8,713	19,249
Missouri	10,292	5,426	1,614	9,075	26,407
Montana	1,266	976	259	2,297	4,798
Nebraska	1,846	1,397	272	5,634	9,149
Nevada	2,764	3,245	789	7,871	14,669
New Hampshire	2,428	1,950	420	3,513	8,311
New Jersey	11,740	5,921	1,352	5,403	24,416
New Mexico	4,470	2,222	520	8,301	15,513
New York	13,874	8,112	2,198	10,161	34,345
North Carolina	21,325	8,374	6,815	12,804	49,318
North Dakota	624	314	63	1,270	2,271
Ohio	10,604	6,004	1,919	14,133	32,660
Oklahoma	11,662	3,755	976	11,118	27,511
Oregon	4,732	5,718	1,120	5,653	17,223
Pennsylvania	16,508	10,177	2,721	10,532	39,938
Puerto Rico	6,506	293	136	660	7,595
Rhode Island	1,354	3,572	241	877	6,044
South Carolina	13,263	9,445	2,192	12,859	37,759
South Dakota	929	478	95	1,871	3,373
Tennessee	12,629	7,623	1,731	9,583	31,566
Texas	52,514	18,106	4,681	67,156	142,457
Utah	2,411	1,327	320	3,847	7,905
Vermont	1,100	546	113	813	2,572
Virginia	29,009	34,297	5,415	18,380	87,101
Virgin Islands	133	50	12	41	236
Washington	17,909	16,057	1,758	16,738	52,462
West Virginia	3,371	1,918	593	2,492	8,374
Wisconsin	4,947	2,847	766	3,716	12,276
Wyoming	694	505	106	1,615	2,920
Other	9,711	7,654	656	8,063	26,084
Total	**528,316**	**391,400**	**86,354**	**545,006**	**1,551,076**

*As of Sept. 30, 1987
SOURCE: Defense Manpower Data Center

Where They Serve

Countries/regional areas where 100 or more United States military members are assigned. Area total include countries with less than 100 assigned United States military members.

	ARMY	NAVY	MARINE CORPS	AIR FORCE	TOTAL DoD
United States, United States Territories, Special Locations					
Continental United States	464,801	268,511	144,706	427,457	1,305,475
Alaska	9,147	2,105	177	11,274	22,703
Hawaii	18,452	12,621	9,717	6,014	46,804
Guam	37	4,353	366	4,022	8,778
Johnston Atoll	122	2	—	8	132
Puerto Rico	396	2,803	173	135	3,507
Transients	15,183	14,786	5,692	10,873	46,534
Afloat	—	188,148	1,066	—	189,214
Total	**508,214**	**493,369**	**161,897**	**459,804**	**1,623,284**
Western & Southern Europe					
Belgium	1,551	128	38	1,916	3,633
Germany (Fed. Republic & West Berlin)	205,435	337	95	41,388	247,255
Greece	466	529	14	2,376	3,385
Greenland	—	—	—	211	211
Iceland	3	1,772	81	1,411	3,267
Italy	4,085	4,675	271	5,838	14,869
Netherlands	828	17	11	2,595	3,451
Norway	33	42	23	123	221
Portugal	56	377	13	1,240	1,686
Spain	25	3,730	198	5,179	9,132
Turkey	1,206	109	20	3,567	4,902
United Kingdom	266	2,359	380	26,575	29,580
Afloat	—	16,331	2,016	—	18,347
Total	**214,019**	**30,444**	**3,307**	**92,473**	**340,243**
East Asia & Pacific					
Australia	9	438	8	295	750
Japan (including Okinawa)	2,152	7,168	22,216	17,404	48,940
Philippines	476	5,718	965	9,587	16,746
Republic of Korea	32,473	403	3,473	11,643	47,992
Thailand	51	10	17	33	111
Afloat	—	19,420	2,899	—	22,319
Total	**35,200**	**33,243**	**29,643**	**38,995**	**137,081**
Africa, Near East & South Asia					
Bahrain	7	117	7	9	140
British Indian Ocean Territory (includes Diego Garcia)	4	1,260	86	15	1,365
Egypt	1,359	29	41	61	1,490
Saudi Arabia	148	43	19	218	428
Afloat	—	11,555	457	—	12,012
Total	**1,778**	**13,054**	**1,016**	**410**	**16,258**
Other Western Hemisphere					
Bermuda	—	1,379	75	—	1,454
Canada	8	390	11	126	535
Cuba (Guantanamo)	—	1,867	642	2	2,511
Honduras*	1,393	5	13	12	1,423
Panama	7,209	487	176	2,745	10,617
Afloat	—	7,116	—	—	7,116
Total	**8,871**	**11,391**	**1,154**	**2,960**	**24,376**

*Includes military personnel on TDY for planning and conduct of exercises

	ARMY	NAVY	MARINE CORPS	AIR FORCE	TOTAL DoD
Antarctica					
Total	**35**	**99**	**—**	**—**	**134**
Eastern Europe					
Total	**73**	**4**	**110**	**18**	**205**
Worldwide					
Ashore	768,211	339,189	190,689	594,660	1,892,749
Afloat	—	242,570	6,438	—	249,008
Total	**768,211**	**581,759**	**197,127**	**594,660**	**2,141,757**

*As of March 31, 1988

SOURCE: Defense Manpower Data Center

fer to buy a few high quality items as opposed to larger number of lesser quality goods, and will pay more for convenience—over 70 percent surveyed said they would pay more for the same merchandise if it were offered close to home.

"In retailing, the needs of this new market will be addressed by those merchants who subscribe to the 'aging as part of life' point of view, and who are clever enough to adjust their strategic and marketing plans accordingly," note Meretrend's director of research Dr. Jeffrey St. Clair.

In the private sector, retailers are beginning to cater to the senior market with special shopping times and days and targeted consulting services. Certain mail order companies have created specialty catalogs targeted to older consumers, and some retailers have instigated annual "seniors only" shopping spree days.

The Decision Factor

Is your sales promotion this month going to attract more male shoppers or more female shoppers? That factor might have more influence on what products are purchased than you think.

Results of a study on family purchasing behavior released by Management Horizons, an international management consulting and marketing research firm, show that while husbands and wives both make purchasing decisions, they are not necessarily shared decisions.

For example, women make the choice when it comes to their own clothing, pots and pans, toiletries, groceries, and non-prescription drugs. Men, on the other hand, make hardware and sporting goods selections.

Decisions made by either the husband or the wife or jointly—with no one gender dominating—include men's clothing, toys and games, family autos and financial planning. Either husband or wife will also independently assume responsibility for purchases of cameras, luggage, and stereos. Rarely are these purchases a joint decision.

Cashing In

"We serve the best customers any retailer could hope to have, the men and women who defend our country and their families," states Brigadier General Jeffery D. Kahla, commander of AAFES. These defenders of our nation are also a choice audience because of their high level of education, their substantial disposable income, and the uniqueness of their lifestyles.

While paralleling many of the trends of the population as a whole, the military community also offers unique opportunities for the smart manager. Though they can and do shop off-base, most military personnel like shopping on-base; they feel they can often get more for their money, and they prefer the convenience. The key to lassoing a substantial portion of this community's extra dollars is through meeting their needs—and keeping up with their changing tastes and desires.

"We strive for the selection of merchandise which will appeal to most of our customers, and we are continually working to improve the shopping environment and customer service," says AAFES's Kahla. "We consider ourselves to be their 'company store'—and meeting their needs is something we take very seriously." ■

Tapping a Growing Military Market: The Great Backyard

BY BRAD P. SMITH

Military personnel may have varying degrees of affection for the great outdoors, but they're certainly spending time and money on their own piece of it—the great backyard. So say the buyers of outdoor living products in the Army and Air Force, Navy and Marine exchanges, where sales of outdoor living products continue to climb in the category which generally includes outdoor furniture, grills, garden tools and supplies, fencing, lawn edging, birdhouses and seed, picnic coolers and yard ornaments.

Enjoying particular success throughout the exchanges are color-coordinated "fashion" items and ready-to-use products. Additionally, buyers generally report that while exchange shoppers are less interested in vegetable gardens than in past years, they're very interested in exquisite landscaping.

"It appears that people are seeing their yards as outdoor family rooms," says Norman Rivkees, military sales representative at Melnor Industries, a major manufacturer of outdoor living products.

Marine Corps Exchanges

During peak season, 14,000 square feet of indoor and outdoor display and storage space at the Marine exchange in Quantico, VA, is devoted to outdoor living products, according to merchandise manager John Hanlin. The most popular items are fertilizers, lime, deco-

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Brad P. Smith is a writer with Communi-K, Inc., a Fairfax, VA-based communications firm whose specializations include marketing and merchandising.

OUTDOOR LIVING SALES IN THE EXCHANGES

($ in thousands)

	Navy			Army & Air Force		
	CONUS	Overseas	Worldwide	CONUS	Overseas	Worldwide*
FY1985	23,840	4,244	28,084	54,418	6,936	61,408
FY1986	23,329	4,579	27,909	57,848	9,368	67,273
FY1987	23,437	4,867	28,304	65,976	9,635	75,683

*Includes mail orders.

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rative landscaping materials and lawn and garden chemicals.

"In general, people who shop the Quantico exchange are buying better quality brand-name merchandise in all areas," Hanlin observes. "More money is being spent on solid wood outdoor furniture, name-brand chemicals and other heavy, durable items.

"This is also true for mowers and tillers," he adds. "People are buying upper-end items such as Toro and McCulloch electric or gas power blowers." Particularly popular are blowers with optional extension arms to clean gutters and those that vacuum.

Sales of outdoor living merchandise at Quantico through September 30 of 1988 reached $738,000—compared to $661,000 for all 1987. The fall season at the exchanges brought increased sales in chain saws, wood splitters, fertilizer and lime.

At California's El Toro Marine exchange, outdoor power equipment, chemicals, fertilizers, barbecue equipment, coolers and picnic baskets top the list of successes according to buyer Dave Farwell.

El Toro outdoor living sales reached $548,000 in 1987. As of September 30, 1988, the exchange had already hit $548,000 in outdoor living sales volume. Yard and garden chemicals accounted for 20 percent of the total sales volume; plants and shrubs, 19.5 percent; and garden supplies and furniture, 15 percent each.

According to Farwell, more gas grills are sold at the Orange County exchange than at any other Marine base. "Charcoal grills are not big sellers for us," he reports. "The military retirees who live in this area buy high-end, full-featured, high-tech gas grills in the $400–$500 range." Farwell rotates the top brands, and reports that the fashionable models—"whichever looks best with redwood furniture"— sell especially well. He also notes that grills with large cooking areas are successful sellers.

Farwell's retiree customers are a more stable consumer population than is typical in the exchanges. "So since our customers remain the same, we alternate vendors," he explains.

"The key to high sales is to get the lines in early," Farwell adds. "We set up 5,000 to 7,000 square feet of outdoor living displays the first of February, and people start buying in early May." He expects a comeback in wrought iron sales next spring.

At the Marine exchange in Camp Lejeune, NC, Jim Wynn, outdoor living buyer, reports that yard and garden chemicals, grass and flower seeds and flower pots top the sales charts.

Camp Lejeune devotes 2500 square feet inside and out to outdoor living products. Their newest product is Homelite's Weed Trimmer; general purpose fertilizer and lime have been available to Camp Lejeune families the longest.

"Overall, we've seen a decrease in outdoor living sales here," Wynn comments, "We were experiencing tremendous sales in plants, but even that's dropped off dramatically. Five years ago, we sold 8,000 azaleas in one week; now we don't even stock azaleas and we're having trouble selling roses.

"It's as though our shoppers have already established their gardens and are now focusing their dollars on maintenance," he observes. Ortho lawn and garden fertilizers and chemicals are enjoying high sales at Camp Lejeune.

"People are buying products that have more ornamental value as opposed to functional value."

In fact, Ortho seems to be holding its own throughout the exchanges. "Ortho sales in exchanges were in excess of $5 million in fiscal 1988," says Skip Dougherty, military sales representative for Chevron Chemical, Ortho's parent company. "This represents a 15 percent increase over 1987."

Ortho's lawn and garden chemicals include foliage protection products, plant food and fertilizer, applicators (sprayers and spreaders), weed control, insecticide bait products and gardening books.

"People are buying products that have more ornamental value as opposed to products traditionally used for vegetable gardening," Dougherty explains. "There's also a strong trend toward ready-to-use chemical products over those that require mixing," he adds.

Army & Air Force Exchanges

Senior buyer Gary Tunnel includes patio furniture, lawnmowers, grills and garden equipment in the Army and Air Force Exchange Service (AAFES) outdoor living lineup. Outdoor living sales at AAFES hit nearly $67 million through September of 1988, compared to $77 million in all of 1987. AAFES's outdoor living sales have steadily increased 8–12 percent each year since 1985.

Hot items of 1988 include AirCap lawnmowers and Weed Eater trimmers; Ortho pesticides and herbicides; Almet/Lawnlite aluminum furniture and Mallin high-end resin furniture.

Almet outdoor furniture enjoyed steady sales in both 1987 and 1988; each year brought sales of $4 million, reports Becky Barlow, an Almet customer service representative. "And we expect growth in 1989," she added.

"We've also seen resin furniture sales skyrocket," observes Tunnel. Resin furniture now claims eight percent of AAFES' total outdoor furniture sales.

AAFES outdoor living sales are higher in the South than in the North due to the length of the season, according to Tunnel. And sales in southern exchanges have other interesting distinctions as well.

- Gasoline-powered string trimmers sell better than electric-powered models.
- Riding equipment tops the lists. (Tunnel believes southerners have larger yards. Sales of larger horsepower riding equipment sales are up nationwide.)
- Pesticides sell better, reprotedly because there are more insects.

"People are more interested in ready-to-use lawn and garden chemicals and upper-end, permanent lawn/patio furniture," Tunnel said. "Outdoor living is one of the few categories in which the more expensive item sells better."

Other popular items at AAFES include self-watering planters, ready-to-use lawn fertilizers (introduced in 1987 at AAFES) and lightweight gas-powered cultivators. "They've sold so well that we've added to our permanent list of products a 25-pound, five-horsepower cultivator known as Li'l Hoe," says Tunnel. Made by Hoffco, Inc., the cultivator retails for $169. Li'l Hoe can till a maximum 9-inch width of pre-broken earth. Optional attachments include a de-thatcher, border/edger and aerator. Fold-down handlebars make it easy to transport in a trunk and its maneuverability in small areas is a big advantage to suburbanites with small gardens.

Weber grills have long been successful at AAFES, and they enjoyed a 25 percent growth in sales last year, according to Gene Jordan. Jordan is outdoor living sales manager for Specialized Marketing, a Texas firm that represents various manufacturers with the exchange services. AAFES carries several Weber grills—from the 14 inch Smokey Joe kettle to the 22 1/2 inch kettle grill.

Grills at AAFES list from $4.95 for charcoal up through $199 for gas, and Tunnel says high-end gas grill sales are steadily increasing. AAFES buys gas grills on a competitive basis and alternates brands such as Sunbeam, Thermos and W.C Bradley's Char-Broil, which has experienced a 25 percent sales increase over the past two years. Char-Broil grills range from a table-top single-burner model to a 42,000 BTU dual burner with 638 square inches of cooking area and gray wood accents.

Melnor sprinklers and accessories, aqua guns and nozzles, and hose storage reels have been sold at AAFES for 15 years, according to Norman Rivkees, Melnor's military sales representative. In 1988, Melnor hose storage products and 'time-a-matic' sprinklers experienced considerable sales growth, Rivkees says.

Tunnel believes the AAFES goal of providing a product mix that targets each consumer group is met in outdoor living. "We're seeing solid sales in all price categories," he reports.

Navy Exchanges

Roger Weigold, hardlines merchandise manager at the Navy field station office in Norfolk, VA, oversees sales at the exchanges at the Portsmouth, Little Creek, Oceana, Yorktown and Norfolk naval bases. He reports that outdoor living sales are six percent above the 1987 figures, when sales reached $3.1 million. Total 1987 sales, which were also six percent above the 1986 figures, were $2.8 million.

"We're very subject to the weather here in Norfolk," Weigold commented. "We had cool and rainy conditions into June 1988. When it warmed up, our outdoor living sales went berserk, then screeched to a halt in October."

As at AAFES, resin outdoor furniture sales are strong at NAVRESSO. According to Weigold, the Norfolk region carries all leading national and imported brands and saw a complete sellout in 1988 of resin sets in the $199 to $299 range.

Introduced in the United States just four years ago, resin furniture was first sold in NAVRESSO in 1988. Conrad Witte, sales representative for Holiday resin furniture, believes Holiday's furniture is popular because it's very durable; it shines; it withstands extreme temperatures; it doesn't need cushions; it wipes clean; and it doesn't rust, stain or peel.

> *"Outdoor living is one of the few categories in which the more expensive items sell better."*

Witte reports $500,000 in sales of Holiday furniture in its first year at NAVRESSO. Holiday chairs are stackable for easy storage; they're sleek in appearance with curved lines and clean grooves. Some adjust to four positions, others are two-toned. Pedestal tables are available in oval or round shapes, and one model tilts. The parent company, Sommer-Allibert, is reportedly Europe's leading plastics processor. Holiday is building a $10 million plant in North Carolina.

"We also sold out a $799 11-horsepower lawn tractor made by MTD," Weigold reports. Sales of MTD tractors were up 15 percent.

Even though a new mall-concept exchange will open in Portsmouth, VA in May, Weigold expects slow growth in 1989 due to an increase in neighboring do-it-yourself competition. "We're estimating a 3 percent actual growth after inflation," he said.

In 1986, Easy Gardener products began selling in NAVRESSO. Since then, sales of the unique items have increased tenfold, according to sales representative Dick Grandy. "Our products take the work out of gardening," Grandy said. "They help decorate the backyard and lower maintenance."

One such product is Weedblock 6+—a fabric that is placed on soil to stop weeds. Weedblock breathes, allowing air, water and gases through. It's been shown to control 95 percent of normal weed growth and reportedly lasts at least six years when exposed to direct sunlight.

Another Easy Gardener product—Floating GroCover—is placed over the top of small plants. It stores heat and keeps plants warm at night, fostering quick growth.

Outdoor living/garden shop sales in Southern California peaked at over $5 million through September 30, 1988, according to Joe Paterson, buyer for NAVRESSO. Sales for 1987 were reported to be $5,895,000.

"We do a large business in outdoor furniture," Paterson said. "We compete very well in this category." Southern California exchanges have noted increased sales in upscale lawn furniture, resin furniture and "action" furniture such as rockers, swivel-base rockers and gliders.

Almet, Mallin, W.C. Bradley's Char-Broil, Weber, Weed Eater, Miracle Grow, Ortho, Kingsford and Royal Oak are the brand names topping Paterson's sales charts.

In the spring, Paterson expects exceptional interest in a new pre-built gas grill manufactured by Arkla of Paragould, AR. "LeGrille is designed to change the shape of the industry," according to Bill Wilcoxson, product coordinator. Arkla offers two LeGrille models: 531 square inches of cooking area and 610 square inches of cooking area. It requires no tools to set up, and can be used within minutes of purchase. It has a sleek design and comes with porcelainized multi-level cooking grids, a framed and tempered glass window with heat indicator, a swing-away elevated cooking rack and an "Embermatic" spark ignitor. Wilcoxson anticipates retail to be in the $230 to $300 range.

Southern California NAVRESSO expects a 5 percent growth after inflation—10 percent in dollar volume—in 1989 outdoor living sales.

Civilizing the Great Outdoors

With sales in the fun, fashion and function of outdoor living equipment inching upward, the future looks bright for manufacturers and consumers. Military families are enjoying the backyard as never before, bringing the indoors out through fashionable furniture, grills and well-kept gardens and landscaping. And if recent sales statistics are any indication, outdoor living products that are high quality, durable, ready-to-use and attractive are the most likely to replace the disposable income in military homes. ■

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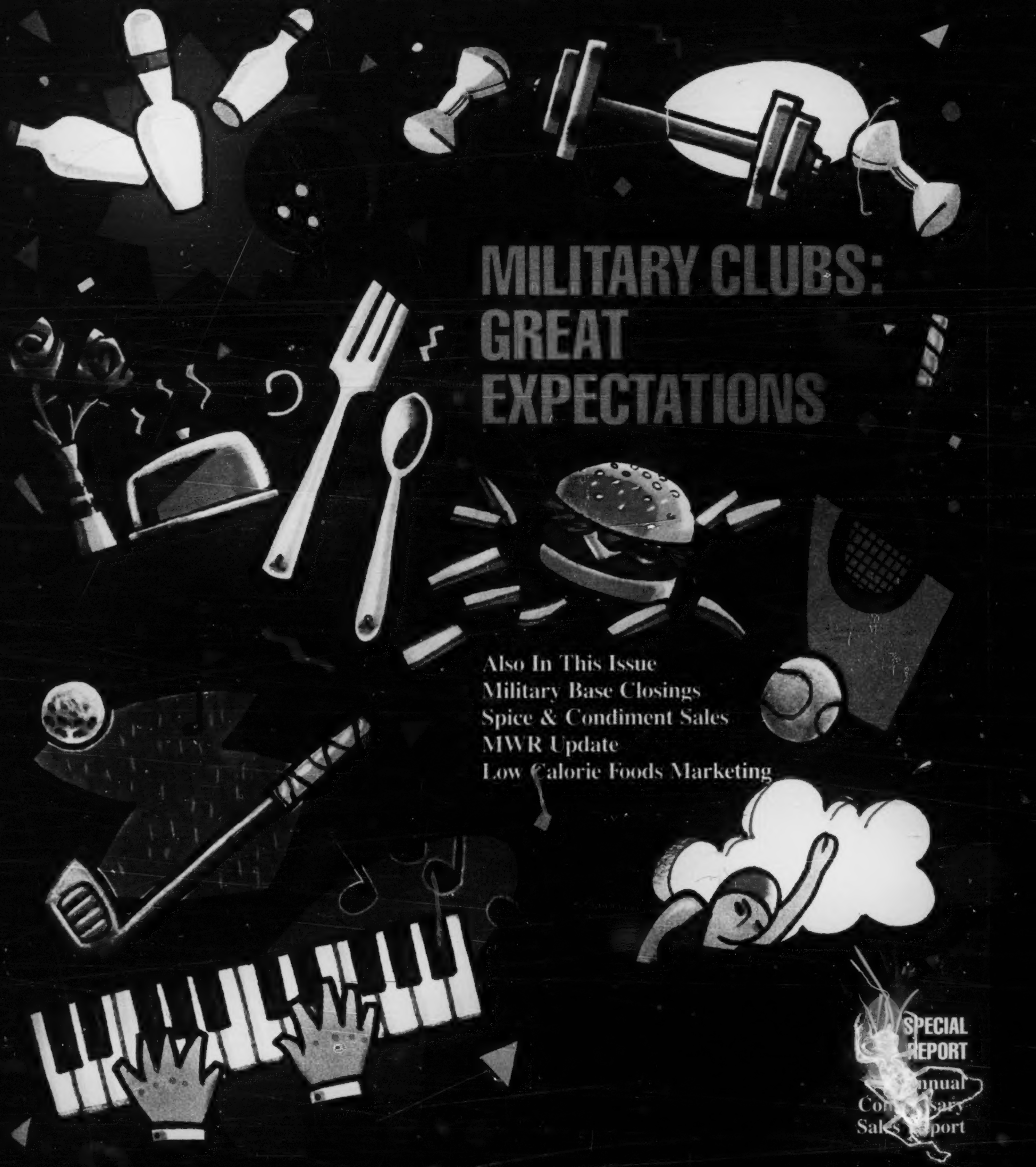

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Spicy Sales in the Commissaries

BY KATHY BOYLE

Explorers, conquerors and those with a sense of adventure have always been linked to spices. Scenes of Arab traders moving camel caravans slowly across deserts and over mountain ranges to faraway sounding places bursting with the rare and exotic, come to the imagination. Today, spices are no less exotic. If anything, they are more so as the spice section takes on the complications of the hurried, busy, health-conscious modern world. No longer is it enough to merely provide a wide array of familiar spices—cinnamon from the Orient, black pepper from Sumatra, saffron from Spain, and turmeric from India. Instead, the spice section now includes low salt products, butter replacements, cheese-spice blends to toss with salads or pasta, and regional American spice products such as Cajun and Mexican specialties. In fact, *New Product News* reported over 375 new

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spice and seasoning products and line extensions introduced in 1987.

As the world's largest importer and consumer of spices, Americans are not afraid of a pinch of this and a dash of that. What they want, however, is convenience. In response, spice companies have been quick to add more conveniences to their spice products. Better package sizing for today's kitchens; convenience-oriented products for busy households, such as dry packaged mixes and coatings); health-conscious products for those on special diets; and more abundant consumer information are examples of the changes that are taking place in the grocery store spice department.

The activity in the department, in part, may be due to a fundamental shift in spice consumption. Today 60 percent of spices are consumed through prepared foods and foodservice meals. That is a reversal from just 20 years ago when home cooking still dominated spice sales. In response, spice manufactures are filling the pipeline with information on how to use spices, or providing whole new product lines where the spices are pre-mixed to bring specific menu results.

Demographics & Diet

Growing affluence, diet consciousness, and a rapidly aging American population are probabiy the chief reasons for the activity in the spice department. Older taste buds cry out for tantalizing flavor substitutes. With almost forty percent of the U.S. population reaching age forty by the year 2000, this will remain an impressive factor in spice sales.

Also, the rising consumption of dietary foods has fueled the demand for spices. Adding one spice or another can make diet foods more palatable for the health and weight conscious consumer.

At the same time, supermarkets and commissaries are getting larger. Potentially there is more opportunity, although hotly contested, for more shelf space for spices. With *Progressive Grocer Magazine* reporting a 35.99 percent gross profit margin for the category (well above the store average), spices offer the opportunity for an excellent return.

Cans & Bottles

Perhaps the biggest change in the spice section is in its packaging. In 1987, McCormick & Co., Inc. began one of the largest revitalization and merchandising programs ever undertaken in the spice industry. The program, referred to as Project One, changes McCormick's entire core line of grocery store products to new plastic bottles.

The new, tamper-evident, see-through packaging not only keeps products fresher but is preferred by eight-one percent of consumers tested, according to McCormick. In addition, McCormick reports that its grocery accounts are very pleased with the new packaging.

In the change-over, McCormick resized a number of its products. By doing this McCormick help retailers and commissaries reduce in-store spice and extract inventories. "Spices that con-

Conus Military condiment sales generate over $44 million annually.

Pickles & Relish	$14,554,000
Ketchup	$10,072,000
Mexican Table Sauces	$ 7,675,000
Worcestershire/Steak Sauce	$ 5,081,000
Mustard	$ 4,127,000
Soy Sauce	$ 2,926,000

Source: Military Audits of Market Information, Inc.
Total Conus 12 months ending December 1988

sumers use more frequently were resized to meet their needs, and others that are used less frequently were put in smaller containers," explains Polly Murray, manager of consumer affairs for McCormick/Shilling Division of McCormick & Co., Inc., Hunt Valley, MD.

Consumer Info Cards

Besides the new packaging, the switchover included a massive new consumer education program, known as Spice Tips. The consumer program centers around 3x5 recipe-sized cards displayed in sheif-hanger baskets in front of the newly converted spice section. The cards provide easy-to-prepare menu ideas using a limited number of ingredients.

To draw the customer's attention to the cards, they are very attractive with full-color photographs of the menu ideas. Although they are not called recipe cards, they usually fall into a typical recipe category—meat, vegetable or dairy—and are arranged in a 3x5 inch format so as to fit in a recipe box. The Spice Tip cards change periodically with new menu ideas or seasonal cooking tips.

Consumers have responded enthusiastically to these attractive cards, according to McCormick. "We did a lot of research with consumers and found they needed ideas on how to put meals together quickly," explains Murray. "Usually the menus on the cards use only four or five ingredients and a specific amount of spice," she adds.

Murray feels consumers really appreciate the thought that went into the cards. The abbreviated list of ingredients required for each menu makes the menus quite simple to use—without having to run to the store for a long list of ingredients. "We try to avoid using the word 'recipe' on the cards," explains Murray. "Instead we call them menu ideas. They are not set up like a menu with a long list of ingredients and steps for preparation. Instead, the menu tips are designed to cook in 30 minutes or less."

One example is Lemon Pepper Chicken. "It requires only three ingredients—chicken, mayonnaise and McCormick/Shilling Lemon and Pepper Spice—and 30 minutes cooking time," she explains.

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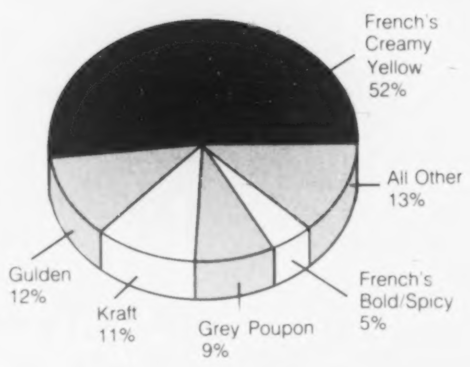
Brand Share Of Unit Volume

Military families consumed approximately 570,000 gallons of mustard during 1988.



Source: Military Audits of Market Information, Inc.
Total Conus 12 month ending December 1988

Beside the menu ideas, the cards include a "Did you know?" section with quick facts about spices. "An example is 'Did you know you could substitute so-much dried, minced onion for so-much fresh onion'," tells Murray.

Strong Product Identity

In the day-to-day world of mergers and acquisitions, in 1986, the spice industry saw the combination of two spice giants, E. R. Durkee & Company and R.T. French & Son into Durkee-French Foods under the joint ownership of London-based parent company Reckitt & Colman. The newly combined company is headquartered in Wayne, NJ. Although the consolidation adds strength to the lines of both products, the old familiar products manufactured by each of the companies still maintain their strong independent identities.

Durkee Famous Foods which started, and is best known for, Famous Sauce, began in the 1850s with just a few spice items, but its product line soon included a variety of imported and domestic spices, herbs, extracts, salad dressings and condiments. Durkee's Famous Sauce flourished through changing times as well as tastes. Today, with increased emphasis on eating light, the sauce is popular as a flavoring for salads, seafood, vegetables, poultry and many other dishes.

Other than its line of spices and famous sauce, Durkee touts a diversified product line of food and non-food products. On the food side are such familiar items as Red Hot Sauce, olives and French Fried Onions, as well as numerous dry sauce and gravy mixes.

The other half of the newly combined company, R.T. French Company, established in 1880 as an importer of other companies' spices, was quick to become a manufacturer and miller of its own spices. But it was the innovation in 1904 of French's cream salad style mustard, known today as "America's Favorite," which catapulted the company to its incredible fame. Sales of Cream Salad Brand mustard soared beyond the expectations of everyone inside the company. Today the French product line includes spices, Worcestershire sauce and, like Durkee, its own line of dry packaged sauce mixes, along with an abundant choice of mustards—Dijon, squeezables, and mustard and relish combinations.

Like McCormick, Durkee-French has placed a premium on consumer research and its internal product research and development. What this should foretell is that once the dust settles from the consolidation, the competition for the consumer's attention should become more intense.

Reaching the Consumer

One example of a tremendously successful program to capture the consumer's attention is McCormick/Shilling's "Spice 'Xpress" newsletter. It began as an outgrowth of the success of McCormick's in-store Spice Tips program. Unlike Spice Tips, which are only available though the commissary, Spice 'Xpress is mailed directly to the consumer. In just six months the list of addressees has grown to 70,000. "We know the newsletter is well read and appreciated," says Murray. "When we did a survey of what columns readers liked or might want included in the future, we were swamped with 10,000 returned surveys. Our next issues will incorporate most of the readers' suggestions."

Convenient Bottling

In addition to dry spices, some familiar bottled products are receiving more distribution in recent years. M. Polaner, Roseland, NJ, attributes the growth of its bottled garlic and basil products, especially the basil, to trends toward international foods.

The bottled garlic, in a 4.5 oz. wide-mouthed glass jar, can be used on garlic bread, salads, meat and fish, and in sauces and vegetable dishes. It eliminates peeling and chopping and has real pieces of garlic. According to M. Polaner, its product eliminates the need for refrigeration and is in a solid pack without commercial oil. And there is no salt added. The product comes in either chopped or chunky varieties.

Along with the ready-to-use garlic product, the company markets a ready-to-use natural basil. The basil can be used in sauces, dips, salad dressings, vegetables and pasta dishes. Since there is no worry about wilting, the ready-to-use basil provides customers a product that is always available. The consumers do not need to rush out to the store to buy fresh. In addition, it has no salt.

With the popularity of international recipes and cooking, there has been tremendous interest in the basil product for pesto recipes.

On the consumer side, the products are supported by 3x5 recipe cards which hangs on a hook from the shelf. Each card has three recipes.

Salt Free

Americans are increasingly aware of how the food they eat affects their health. Experts agree that we should avoid too much sodium, fat, saturated fat and cholesterol in our diets. The problem most Americans face is putting this advice into practice. They tend to want food that is satisfying as well as good for them.

Taking on the challenge of providing satisfying taste for those concerned with sodium in their diet, McCormick/Shilling's new "Parsley Patch" provides some of the sought-after taste, without the salt. Parsley Patch is packaged under its own banner name to distinguish it from McCormick/Shilling's regular line of spices.

Two advantages of the product line are that it is offered in six distinct blends and it is very high in flavor. "When you remove the salt, you remove a satisfying ingredient," explains Murray. "With the Parsley-Patch Blends we were able to put back the high flavor."

Each flavor includes specific suggestions for use. For example, "It's A Dilly," which is flavored of onion, garlic, sesame seed, dill, lemon peel and jalapeno pepper is recommended for baked potatoes, chicken, fish and vegetables.

Dry Seasonings

Companies have been quick to add products to the Dry Seasonings Section of the supermarket to simplify menu preparation. More recently they have also taken advantage of the shifts in consumer eating by adding seasoning packets which match these trends. For example, in Fall 1987, McCormick/Shilling took advantage of the surge in chicken consumption and introduced Chicken Sauce Blends in six flavors. "You could have a different chicken blend almost every night of the week," says Murray.

Hotter Than Ever

In the heart of Louisiana's Cajun country a family tradition continues. McIlhenny Tabasco is still made on Avery Island, Louisiana, in much the same way as it was 100 years ago—by aging a spicy pepper mash concoction in oaken vats for three full years before bottling it.

The origin of the famous McIlhenny Tabasco peppers used to make the sauce, according to family lore, is traced to a traveler passing through Louisiana before the Civil War. The traveler gave Edmund McIlhenny a handful of Capsicum peppers from Mexico. The pepper went into the kitchen garden and the hardy plants survived the Yankee occupation. Whatever the origin, McIlhenny know what to do with them. He chopped them up, mixed them with vinegar and Avery Island salt, put the mixture in wooden barrels to age and funneled the resulting sauce into secondhand cologne bottles.

The sauce was a quick and phenomenal success. Avery Island, heavily mined for its salt, is what is known as a salt dome, and it was the salt of Avery Island that opened Tabasco sauce to the outside world. In 1880, the American Salt Company opened a mine on Avery Island, and by 1886 the Southern Pacific Railway linked the island on a branch line to provide an easier way to ship salt and Tabasco.

Although there has been a surge in the popularity of Louisiana Cajun foods in recent years, McIlhenny feels its product transcends the trend and has a mystique all its own. Nevertheless, the company feels its product fits into a broader, more general eating trend. Richard Dunn, vice president, Marketing and Sales for McIlhenny explains, "What we see is a general trend in eating hotter and spicier foods. For example, that very large portion of the population, the Baby Boomer generation, who are starting to get a little older now, are looking for different food tastes on the palate. Tabasco fits that trend."

To continue to capture the consumer's attention, McIlhenny brings food critics and other influential people to Avery Island. "We are still heavily involved in public relations with the brand," says Dunn. "But," he added, "we have changed our methods a bit. Today, in selected markets, we advertise on television. And, since McIlhenny Tabasco is sold in 130 countries, we employ advertising agencies worldwide—in Europe, Japan and Great Britain."

Besides advertising in military-targeted magazines, Dunn points to some of the special military promotions the company used in recent years: "Our past president, Walter McIlhenny was a retired Marine Corps general. He was deeply in love with things military," says Dunn. "So, especially for the military patron, we developed our own 'Charlie Ration Cookbook' illustrated by cartoonist Mort Sahl of the Beetle Bailey cartoons." Copies of the cookbook are still available, upon request.

In addition to its very strong commissary sales, Dunn points to the terrific business they are doing in military Ready-To-Eat Meals. "Last year we put over one million packs of Tabasco sauce in Ready-To-Eat meals packaged by the military."

Peppers Add Zest

Another good example of how consumers' taste buds are crying for more flavor is the recent interest in speciality and international peppers. Growing at a rate of 15 percent per year, customers now use prepared pepper products for hot and cold appetizers, side dishes, Mexican entrees and party fixings, such as a topping for nachos.

To keep pace, B&G Peppers, part of M. Polaner, created its own premium line of international peppers. The new line is bottled in clear bevelled jars with very upscale, premium quality labeling. The colorful labels give a fresh, new look. Of the eight products in the new pepper line, only two were manufac-

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tured by M. Polaner previously, and those two are now re-packaged to match the rest of the line.

M. Polaner believes that it is the only company to manufacture several of the products in the line. In only a few months of distribution, Polaner reports the product is doing very well.

To set the products apart from other pepper condiments, the company designed red, interlocking shelf-organizers which add a departmentalized look to the products when they are put on the shelf. It also created a contemporary "Pepper Place" display which holds 12 cases of product for fast, impulse sales. Point-of-sale materials include small recipe booklets which hang on the jars with menu ideas and serving suggestions.

Old & New

Although they are the mainstay of the condiment department, ketchups have also gone through some tumultuous times. Like spices, there have been widespread changes, including the use of plastic containers with tamper-resister caps and the addition of low calorie catsup.

Throughout 1988, the ketchup giants warred with some aggressive pricing strategies. But, the attention to the category must have paid off. After four consecutive years of decline, the category moved upward at a one percent annual rate.

Interestingly, companies have learned a lot about consumer preferences as they have made packaging changes. For example, in 1988 Heinz reintroduced its 64-ounce Heinz Ketchup in a plastic bottle, but this time with a handle. It became a major and immediate success.

Similarly, as the sauce department has proliferated with new products, such as Nabisco Brand's A.1 Poultry Sauce, older products have had to weather the storm. For example, although A.1 Poultry Sauce and the older, more familiar Heinz 57 Steak Sauce are designed for two different audiences—one for steak and the other for chicken—they do nip at each other. According to Nabisco, the A.1 Poultry Sauce achieved greater than expected volume growth. Still, Heinz 57 Steak Sauce weathered the new introduction quite well.

Following the general trends toward fish and poultry consumption, other specialty sauces are also selling very well. "Fish-oriented sauces are going through the roof," says Brian Ruder, vice president, Consumer Products Marketing for Heinz U.S.A. "They are growing in excess of 15 percent annually, as consumer preference for fish at mealtimes continues to increase." Heinz Cocktail Sauce held a 28 percent share, and its Tartar Sauce, introduced in 1987, achieved close to a 20 percent share in those areas where it was marketed.

"To capitalize further on the trend toward increased fish consumption, we've just introduced exciting new in-store display units for Cocktail and Tartar Sauce to generate major display activity at the supermarket fish counter. These units also include free refunds for fish purchases," says Ruder.

Like the line extensions in the mustard section, good old ketchup is going the way of mustard. Now there is Ketchup 'n Onions, Hot Ketchup, and Low Sodium Lite Ketchup. To support its Heinz Ketchup 'n Onions line, there is a mini-recipe booklet with twelve, easy-to-prepare menu ideas. Each includes a relatively short list of ingredients and capitalizes on regional tastes with menu offerings such as savory orzo, mock cabbage rolls, and Mexicaili Omelette.

Spice of Life

As always, variety seems to be the spice of life, as it is also of spices and condiments. Due to a combination of growing affluence, aging tastebuds and a general high level of concern for health, the spice and condiment departments should continue bustling well into the future. One would expect continued product line extensions, more introductions of health-oriented products, and more pre-mixed spice packets or products. ■

Best Selling Steak/ Worcestershire Sauces

- A-1 Steak Sauce 10 oz.
- Heinz 57 Steak Sauce 10 oz.
- French's Worcestershire Sauce 10 oz.
- A-1 Steak Sauce 15 oz.
- Lea Perrins Worcestershire Sauce 10 oz.

Source: Military Audits of Market Information, Inc.
Total Conus 12 month ending December 1988

Base Closings: What Will Be The Impact?

BY JIM OSTROFF

The answer is: 86 military bases to be closed by 1995, along with 27 commissaries and post exchanges.

The question?: What is the impact of the Defense Department's plan for the biggest base realignment since the 1960s? *Buzzz*. Wrong!

The question in *this* unique version of "Jeopardy!", the popular television game show in which contestants must think backwards to supply queries to nebulous answers, is actually a multiple conundrum:

How will the military resale system cope with the closing of some its largest commissaries and PXs? Will patrons, especially millions of retirees and reservists, instead spend their money in civilian supermarkets and department stores? Will the resultant loss of PX revenues cause an already pressured Morale, Welfare and Recreation program to go belly up? And will patrons, whose money built these military stores, lose their investment after the facilities are auctioned off to commercial developers?

"These questions are all very good and need to be answered. The problem is no one really knows the answers at this time," said a peeved Rep. Nicholas Mavroules (D-MA), a member of the House Armed Services Committee. Left feeling around in the dark, too, are Reps. Marvin Leath (D-TX), the MWR Panel chairman, and David O'B. Martin (R-NY), another member, and the defense establishment. (In late winter, Reps. John Kasich (D-OH), H. Martin Lancaster (D-NC), and Solomon Ortiz (D-TX), joined the Panel as members.)

Yet for all of these unknowns, and worries that the resale system and MWR programs could be in *real* jeopardy, Congress last month embraced the base closing plan, without demanding answers first, much as a father would a wayward son. And why not? In a real sense the plan is the lawmakers' offspring.

Concerned about the continued operation of bases and missions that had outlived their usefulness, and the resultant drain on dwindling defense dollars, Congress in May 1988 chartered the Defense Secretary's Commission on Base Realignment and Closure to scrutinize every military installation in the nation, its possessions and territories. Composed of present and former defense and congressional officials, and private industry executives, the commission was a legislative device to end-run the lawmakers' own 1977 directive that effectively barred any base closing affecting 300 or more civilian defense employees. The only restrictions placed on the commission were that monetary gains from base closings had to be realized within six years and at no detriment to the U.S.'s defense posture.

After seven months of study, the commission in December 1988 recommended that 86 installations should be closed, five partially shuttered and that another 54 have their missions changed, resulting in either a personnel gain or loss. In total, nine commissaries and 18 PXs will be closed, while the fate of another commissary and two more exchanges is unknown. When fully implemented, the commission estimated $693.6 million would be saved annually and $5.6 billion saved over 20 years. As a footnote, the task force said the arbitrary six-year payback period was "too limited." It could "not discover the genesis of this requirement, but as a result of it many otherwise sound (base closure) actions were discarded."

Nevertheless, the recommendations became law automatically following a 381-43 House vote on April 18, supported by all Panel members, defeating a resolution (H.J. Res. 165) to scrap the closure plan. The congressional mandate likely will short-circuit threats by the California, Illinois and New Jersey delegations to halt the base closings via back door maneuvers, tied as it was to Congress's

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Jim Ostroff is a Washington, DC-based correspondent who covers the White House and federal agencies.

first place.

"Most members of Congress favor implementing the base closure plan because it will allow them to put this touchy issue to rest for a decade or so, just the way they did the military retirement situation a few years back," said a congressional staff member who requested anonymity. Equally important, the staffer, who is conversant with the realignment issue, said the commission exercised political acumen so as not to ruffle the wrong feathers. "The bases it selected for closing don't have the 'sensitivity' they would have had if the commission had chosen installations in the districts of House and Senate military committee chairmen," the staffer posited. "They were smart enough not to do that."

The commission, for its part, having made its report to former Defense Secretary Frank Carlucci, dutifully disbanded, taking itself out of the resultant brouhaha. Save for its recommendations for some minor federal efforts to aid communities affected by the closings, the commission deflected concerns about the realignment's adverse impact on military personnel and the resale system. In a terse report statement, it concluded its review of base closings since 1961 found them "generally less traumatic than people anticipated," adding "in many cases, Defense Department jobs have been replaced by new civilian jobs and the bases themselves converted to civilian uses."

But for some members of Congress belief in such assurances requires an enormous leap of faith to assuage their concerns—and raises a plethora of questions. For starters, MWR program officials fret the closing of 27 commissaries and PXs will produce a ripple effect, harming the $12.4 billion domestic resale system.

With fewer military bases Leath worried about "the impact upon people that will have to shop at commissaries that are more crowed as a result of the closures until the system can react to increase store size." "An example," said Martin, "is the closure of George Air Force Base (CA), where commissary and PX patronage would spill over into nearby installations capacity." Some bases, he said, [illegible] experience an increase of nearly 3,000 employees.

Rep. Les Aspin, the HASC chairman, said the realignment plan will produce a net loss of 13,000 military jobs that "can easily be absorbed because of the heavy turnover there." However the Wisconsin Democrat conceded "the civilian cutbacks mean real pain for 8,000 families" where the wage earners must choose to either relocate to other military installations, or find new jobs.

Lt. Col. Jungus Jordan, an MWR spokesman for the office of the Secretary of Defense, said it is anticipated patrons as Cameron Station, Alexandria, VA, could shift their commissary and shopping trips to several other bases in the National Capital Region, including Ft. Belvoir, VA. In addition, Jordan said a similar shift is anticipated from Norton AFB, 60 miles east of Los Angeles, when its missions and staff are reassigned to March AFB.

To some extent, these problems could be offset by extending the hours of military stores not affected by the realignment, and by enlarging these facilities—but at a cost no one is willing to estimate now. Meanwhile, Clare Moelk, another Pentagon MWR spokesman, observed that "some local community leaders look at the base closing initiative as a boon to their local economies. For example, the thought is that the closing of Cameron Station will improve the retail business in Alexandria." It is just this prospect that poses grave concerns to Congressional resale system officials and observers.

"Even if you do extend commissary and PX hours and expand some facilities, you'll still have a potential problem with an overflow of shoppers once the bases are closed," said the congressional staffer. (For several years patron surveys have shown that relatively crowded conditions at some of these stores is considered a disincentive to shop there.) Rather than fight possibly bigger lines and shop at less convenient locations, many patrons might switch to local supermarkets and department stores—a fear that is not

"It is plain unrealistic to expect patrons of the Ft. Sheridan commissary (located 28 miles north of Chicago) to shop at Ft. Benjamin Harrison, near Indianapolis," the aide averred. "At some point, the 25 percent savings at a commissary is just not worth the extra drive, especially when you have so much competition from a regional (civilian) chain like Cub supermarkets. I think it's obvious that we're going to lose some patrons as a result of the base closings." Concurring with this assessment, Martin observed "that many people would elect to shop at commercial supermarkets and department stores rather than driving the distance to save at the PX and commissary. It becomes a matter of distance balanced with personal economics."

But more ominous yet is the specter of up to 2.55 million retirees and reservists taking their patronage elsewhere once the realignment is completed in 1995. "It should be stressed that the largest impact will be upon retirees and reservists in the community. They do not move when the base closes. They either have to drive to another base, or shop commercially," Leath said. "Naturally, if there is not a base nearby, customers will do their shopping in commercial supermarkets and stores."

Ironically, the retention of retiree-reservist loyalty could pose its own problems in areas such as metropolitan Washington, where Martin noted the anticipated "shift in shopping of the many thousands of retirees in the area" after Cameron Station's demise would overburden "an already crowded store at Ft. Belvoir."

The gravity of such problems are not lost on the DoD's Jordan. "Of course, we have contractual agreements that certain things will be provided to military members such as commissary privileges, he said, "While in the past we have only established commissaries at installations with active duty missions, retired military members take the availability of these facilities into consideration when choosing where to reside. With the closing of bases some persons on retired status will face the potential for being disfranchised from receiving (commissary and PX) benefits if they stay in that area. Obviously, the impacts associated must be considered in any decision." While there is no estimate yet as to the number of retired military members who will be affected by the realignment, there are 1.45 million retirees in the continental U.S. and 1.1 million reservists.

Moreover, Jordan made it clear that the issue transcends mollifying retirees, to one of recruitment and retention of soldiers, sailors and airmen. "We get back to the old question about the impact of (benefit disfranchisement) on retention when we don't keep our contract, whether implied or real. And this *is* a real contract with those to whom we said, 'If you stay with us for a career we will provide you with commissary, PX and medical benefits, for the rest of your life,'" he said.

Consequently the DoD now is studying the issue of base closures with an eye towards "some type of arrangement where we are not totally disenfranchising people," Jordan said.

Meanwhile, Leath and Martin aver they are as much in the dark as anyone concerning the quantitive impact of the base closings on commissary and PX sales, with the New York congressman observing the only likely, immutable effect, is that "closures will result in sales declines that will cause a drop in collective system sales." Moelk reported a Defense study of base closings, that would establish its actual impact on the resale system and how much money will be needed to expand remaining commissaries and PXs, probably will not be completed until next year. "We do assume that some of the proceeds from the sales of the bases will be used to upgrade all community facilities at bases getting new people and missions," he noted.

For the MWR Panel members, this money is a *very* sore point and they assert that it should be used for one purpose only. "Most of the commissaries and PXs that would be closed were built with either nonappropriated funds, or surcharge funds that were collected from service members and their families," Martin said, adding, "we will closely monitor the funding of the closures to ensure

Estimated Present Value of NAF-Built Facilities on Military Installations Scheduled for Closure

(in $ Millions)

ARMY—Total $21.431 Million:

Presidio of S.F.	
Bowling Center	$2 540
Burger King	1 614
Main Exchange	4 569
Concession Mall	748
Branch Exchange	609
Total	$9 990

Fort Dix	
Car Care Center	2 692
Burger King	776
Theatre	2 656
Total	$6 124

Cameron Station	
Branch Exchange	1 900
Total	$1 900

Fort Sheridan	
Shopping Center	3 417
Total	$3 417

NAVY—Total $9.481 Million:

Naval Station—Puget Sound (Sand Point)	
Handball Court	$ 110
CPO Club	125
Recreation Bldg	360
Athletic Field	113
Officers' Club	350
Service Station	1 750
Country Store	2 500
Total	$5 308

Naval Station—New York (Brooklyn)	
Bowling Center	$ 700
Swimming Pool	300
Athletic Fields (2)	273
Gymnasium	1 300
Total	$2 573

Naval Hospital—Philadelphia	
Recreation Bldg	1 600
Total	$1 600

Air Force—Total $50.621 Million

Mather AFB	
Shopping Center	$ 6 173
Branch Exchange	850
Theater	1 902
NCO Open Mess	195
Officers' Open Mess	700
Arts & Crafts Skill Development Center	400
Auto Skill Center	459
Bowling Center	550
Racquetball Cts (4)	575
Exercise Area w/2 R/B Cts	050
Child Dev Center	800
Golf Clubhouse & Snack Bar	062
Golf Course (18 Holes) & Cart Storage	450
Pool & Bathhouse	250
Total	$13 416

Norton AFB	
Shopping Center	$ 5 826
Burger King	483
Service Station	741
Theater	1 813
Arts & Crafts Skill Dev Center	359
Bowling Center	155
Child Dev Center	651
Golf Clubhouse	970
Youth Center	652
Youth Center Addition	504
Officers' Open Mess	447
NCO Open Mess	271
Total	$12 872

Pease AFB	
Shopping Center	$4 690
Racquetball Cts (3)	250
Auto Skill Dev Center Addition	275
Total	$5 215

Chanute AFB	
Branch Exchange	$ 752
Shopping Center	4 972
Service Station	632
Branch Exchange	447
Recreation Center	250
NCO Open Mess	180
Combined Arts and Crafts, Auto Skill Development Center	2 000
Bowling Center and Snack Bar	950
Youth Center	1 000
Child Dev Center	450
Golf Course (18 Holes) & Cart Storage	400
Swimming Pool Bathhouse	066
Total	$12 090

George AFB	
Main Exchange	$3 412
Launderette	184
Burger King	496
Bowling Center	263
Golf Cart Storage	285
Golf Course (9 Holes) w/Sprinkler System	559
MWR Supply	275
Auto Skill Dev Center	327
Youth Center	446
Child Dev Center and Addition	733
FAMCAMP	048
Total	$7 028

Source: DoD

that PXs and commissaries are treated fairly." Taking a tougher stance yet, Leath stated, "The MWR Panel intends to work to recover funds that have been invested by service men and women in facilities that have been targeted for closure in order that these dollars can be channeled to support resultant shifting markets.

"The Panel's position is clear," he said sternly. "The military service member should not have to bear the cost of either strategic mission shifts or other decisions that are made in either strategic or national interests." Adds former MWR Panel member Mavroules: "These facilities were given to the DoD free of charge . . . and now they are going to be sold off or given away when the base closes. The soldiers, airmen and sailors should get their funds back."

In fact, the disposition of these monies is but one of several contradictions in the base closing plan, according to the congressional aid. "It is quite ironic that military personnel used their own money to build the commissaries and PXs, but the issue of compensating these people was never even considered in the base realignment plan. In one instance, the Army is spending about $4 million to build a new commissary at Ft. Sheridan that's set to open soon. The Army doesn't know if it should open the commissary, or just leave it empty until the base is closed," the aide said. "Then there is the situation at the Presidio (in San Francisco) where the Army jumped through hoops for years to get permission from local authorities to expand the commissary and PX at a cost of about $20 million. What happens now is unknown."

The congressional staff official related that when the lawmakers chartered the commission they considered tackling the knotty issue of refunding money to service members "but the leadership decided not to (address it) since this money was seen as small potatoes and it wanted to concentrate on large issues."

The MWR Panel chairman said he expects the DoD "to place a hold on all construction at bases targeted for closure, while Jordan noted the department's intent is to recoup the approximately $40 million spent on commissary construction since 1981. The amount of money spent on PX construction during this same period could not be determined. The Panel, as well as the HASC's Readiness Subcommittee, will ask the DoD for a complete inventory of commissary, PX and construction projects that will be affected by the base closing plan, Mavroules said.

Base Closure Impacts Commissary

	Facility Constructed	Cost	
		Surcharge	Appropriation
Army			
Lexington Depot, KY	June 1987	$1.5M	—
Fort Sheridan, IL	April 1989	$4M	—
Presidio of San Francisco	June 1989	$12.9M	—
Cameron Sta., VA	1940s	Unknown	
Air Force			
Mather AFB, CA	1980	$3.1M	—
George AFB, CA*	1972	—	$1.1M
Norton AFB, CA	1987	$8.2M	—
Chanute AFB, IL	1981	$4.9M	—
Pease AFB, NH	1972	—	$0.9M

*1989 surcharge construction requested but deferred

Navy/Marine Corps			
None			

Source: DoD

Meanwhile, both Leath and Martin said they do not believe the closure of the Western Regional Office of the Air Force Commissary Service at Norton AFB would pose any logistical problems for commissary operations, since the headquarters would be relocated at another Western Air Force base. Martin, though, conceded that Defense will "have to make adjustments to its transportation system to make up for the loss of the New Orleans Military Ocean Terminal with an associated impact upon PXs and commissaries."

If there is any bright spot in these otherwise murky proceedings it is the possibility that the base closings and attendant consolidations might improve the performance of the oft-criticized MWR programs. "In some cases, a concentrated market will enhance MWR self-sufficiency," Leath said. Elaborating on this logic, Martin observed, "The realignment increases the population at some bases. This . . . allows for improved economies of scale."

But even this perceived benefit elicits fears about killing the proverbial "golden goose," since PX earnings, or profits, are used to support other MWR programs such as sports and athletics, recreation centers, and youth activities.

Consequently, it would appear that the impending closure of 18 exchanges might make it more difficult to manage the overall MWR program, since a reduction in stores would translate into lower sales, hence reduced dividends to subsidize MWR activities. Panel members said this is a valid concern, but note they have insufficient information on which to assess the monetary effect of base closings, on PX dividends. Exchange earnings totalled $378 million in fiscal 1987.

For the DoD's Moelk, the impact is just as clouded. "There could be some effect on the exchanges' ability to generate earnings to support the MWR programs. But, on the other hand, when you close a base you obviously don't have to support its MWR operations. So it could be a wash."

Such concerns aside, the overall sense of Congress seems to be that this plan is better than none at all. ■

Healthy Foods "Lighten" Up Military Diets

BY SHERYL L. HERRIN

My mom pulls up to a Wendy's drive-in window and shouts, 'I'll have a double with cheese, hold the mayo; large fries; medium shake; and oh, yeah, I'm on a diet, add a salad with that,' jokes a popular comedy club satirist about today's prevalent eating philosophy.

This "skimp and splurge" eating trend has ironically increased low calorie food sales while maintained healthy commissary sales in higher calorie products such as Haagen Dazs ice cream, according to Gary Duell, director of merchandising for the Air Force Commissary Service.

People seem to be hoarding and spending calories. They're sacrificing a little by choosing diet drinks, low-cal dressings and avoiding fried foods in order to "spend" the calories they've saved on gourmet cookies and ice cream.

Consumers are becoming increasingly in tune with this philosophy as more products adopt low calorie lines. Military commissaries stock low calorie foods in frozen, dairy, dessert, spice, beverage and dressing categories. Almost every food seems to have a low calorie alternative. However, these same "skimp and splurge" eaters are also looking toward more "healthy" foods, not just those low in calories.

Switch on the "Light"

Television talk shows, newspaper and magazine articles are giving plenty of coverage to new medical studies linking high cholesterol, fat, and obesity with health problems such as clogged arteries, high blood pressure, cancer and heart failure. Medical studies on dieting are supporting a maintenance program incorporating exercise and low calorie foods.

According to Dr. Kelly D. Brownweel, PhD, in the September 1988 *Working Woman*, "yo-yo" dieting, constantly going on and off diets, can actually slow the metabolism and make it easier to gain weight.

Even cookbooks, like Lynn Fischer's *Low Cholesterol Gourmet*, extol the virtues of eating light. Recipes offer alternatives to high calorie, salt and fat products.

Market research by ConAgra has found that the public is not just calorie-conscious anymore. "They're increasingly conscious of sodium, cholesterol and fat content," says Pat Quarles, director of Consumer Affairs at ConAgra. "They're exercising more and following doctor's orders," she adds.

Through the use of NutraSweet, salt substitutes, and low fat milk, manufacturers offer consumers ever-increasing light products. These products contain "light" concentrations of fat, cholesterol, salt and calories. And it's becoming increasingly difficult to categorize a product as diet, low sodium, cholesterol or fat, when in many cases it's all four.

The Air Force commissaries tend to classify these as either "health" or "fitness" foods. They are both usually low

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Sheryl L. Herrin is a writer with Communi-K, a Clifton, VA-based firm whose specialties include marketing and merchandising.

in cholesterol, fat and sodium and high in fiber, with the difference being sugar levels. Fitness foods such as granola bars use a high sugar content to give energy. Young people, especially athletes, want the sugar found in fitness foods, explains Gary Duell, AFCOMS director of marketing.

Light Foods: Heavy Sales

Frozen food purchases correlate directly with today's military lifestyle. Families are spending less time preparing foods, as more and more wives are joining the work force, and anything that can save time is appreciated. This is reflected in the fact that Weight Watchers frozen entrees are typically purchased by women ages 25–54 years old, making $25,000 per year, according to a spokesperson from H.J. Heinz Co., the owner of the 26-year-old Weight Watchers.

The increased popularity may also be a direct result of growing microwave sales in many cases. In 1988, 17 billion microwaves were sold. Today approximately 75 percent of the general population own them, according to March 1988 *Supermarket News*.

The most significant growth in the frozen food category has been in the low-cal premium entree segment. Premium entrees are more expensive main dish items, and they don't include desserts or side dishes. Quarles believes that they're more popular because "people can add their own touches to them." For example, chicken fajitas can be complemented with rice or a fresh salad and a low-cal dressing.

CONUS commissary sales in the frozen diet dinner and entree market were over $24 million during 1988, according to Military Audits of Market Information, Inc. Weight Watchers and Lean Cuisine dominate this market, producing 41 percent and 36 percent of the total low calorie sales, respectively. Following them are Budget Gourmet with nine percent of sales, Classic Lites with seven percent, Le Menu Light with four percent and all others three percent.

Light Products Demonstrating Significant Growth In The Frozen Novelty Section.

Top Five Light Frozen Novelty Products:

1) Crystal Light Cool & Creamy Double Chocolate Fudge
2) Crystal Light Cool & Creamy Orange/Vanilla
3) Crystal Light Frozen Drink Bars Strawberry/Cherry
4) Weight Watchers Orange Vanilla Bar
5) Weight Watchers Double Fudge Treat

(TOTAL MILITARY 3 MONTH ENDING DECEMBER 1988)

Source: Military Audits of Market Information, Inc

The five top selling meals in the frozen diet dinner and entree category are:

- Lean Cuisine Glazed Chicken with Rice
- Lean Cuisine Spaghetti with Meat Sauce
- Weight Watchers Stuffed Turkey
- Weight Watchers Lasagna
- Lean Cuisine Chicken Chow Mein

To satisfy the sweet tooth, frozen desserts, regular and low-cal, account for over $9 million in annual military sales. Sales in this category are up seven percent. Frozen pie sales, however, continue to decline in the low calorie dessert category. Consumers look more towards low-cal products such as Weight Watchers Chocolate Mousse, Brownies and Strawberry Cheesecake. And, according to Military Audits of Market Information, Inc., light frozen novelty products accounted for almost seven percent of the total CONUS dollar sales in 1988. Dollars are up over 50 percent from 1987. ConAgra, honing in on this health-conscious trend, is currently test marketing a new product, Healthy Choice, to select military commissaries. Healthy Choice is a line of ten low calorie frozen dinners, advertised as "meeting the American Heart Association's requirements for good health." It's being promoted as a good health rather than a dietary product.

Drink To Your Health

Military Audits of Market Information, Inc. reports that diet products represented 36 percent of the total military carbonated beverage sales in 1988. Twenty-seven percent of all beverage sales were of diet colas, 12 percent were diet non-colas, 34 percent were regular colas and 27 percent were regular non-colas. The most popular diet cola, according to total 1988 continental U.S. military sales figures, is 12-ounce, six-pack Diet Coke. It is followed by the 12 ounce, six-pack Diet Pepsi and two liter Diet Coke. The top two non-cola diet beverages are 7-Up and Dr. Pepper.

In 1988, continental U.S. military sales for carbonated beverages reached $140 million. Of the low calorie carbonated drinks, approximately $36 million were spent on diet colas and $13 million of the sales on diet non-colas, totalling $49 million.

Duell believes sales for all beverages using NutraSweet, from sodas to powdered drinks to fruit juices, have increased because parents generally feel NutraSweet is a healthy substitute for sugar.

Marine and Navy commissaries are also seeing increases in low-cal pourable dressings, mayonnaise, gelatin, puddings and cheeses.

Say Cheese

Kraft has experienced significant sales increases in its Kraft 100% Natural Cheeses. Although Kraft has been manufacturing low calories cheese, salad dressing and jelly for about 15 years, the high demand for low-cal and low-sodium cheeses has only occurred during the past five years. According to Sam Phelps, vice president for Kraft's military sales, Kraft has now extended its line of natural low-cal and low-sodium cheeses to include colby, swiss, sharp and mild cheddar varieties. Kraft has also added low-cal dressing to its Seven Seas line.

"Light" Fruit

Twenty-one percent of all canned fruit sales, according to Rita Held of Del Monte Consumer Affairs, are "light." From 1987 to 1988, Del Monte experienced a seven percent increase in sales for light fruit, and only a one percent increase in purchases of regular canned fruit. Their Fruit Naturals are canned in juice rather than syrup and boast 50 percent fewer calories. Sliced peaches continue to be the most popular canned fruit.

"Light" Support

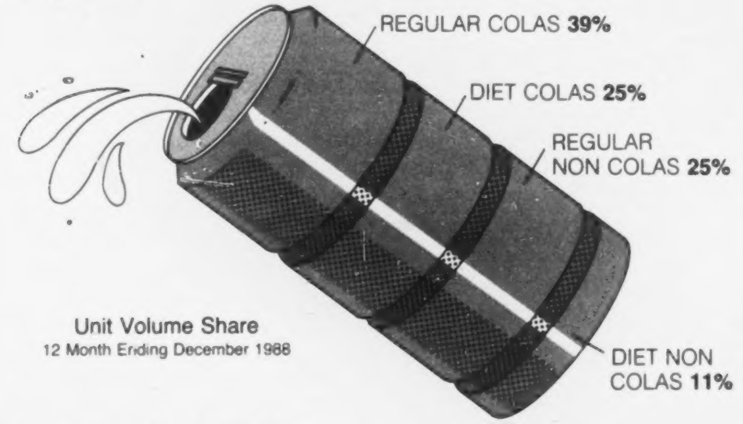
Although military buying trends generally follow those of the general American public, Army personnel, according to Doug Davant of the U.S. Army Troop Support Agency, tend to be even more diet and health-conscious.

Most military personnel are required to maintain certain weight and fitness levels. Army soldiers must pass unannounced physical fitness tests twice a year. They are discouraged from smoking, and on-base happy hours have been eliminated. In some cases, personnel can even be discharged from duty if proper weight isn't maintained. The Army does, however, provide remedial physical training and diet programs for those that need it, Davant assures.

Loraine Salerno-Sorensen, a dietitian for the Army food service dining facilities, says that the military is concerned that its personnel is provided with healthy food choices at its dining facilities as well.

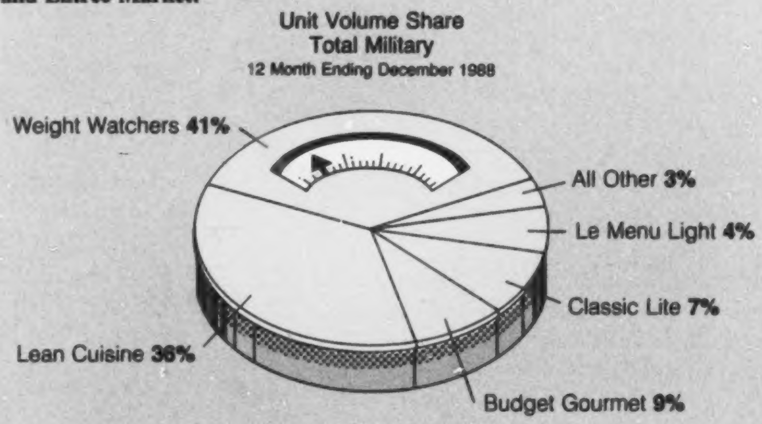
In 1982, with the inception of physical fitness into Army regulations, nutritionists were hired to look into the fat, cholesterol and overall nutritional value of the food served in Army dining facilities. Since then, over 1,600 Department of Defense recipes have been

Diet Products Represent 36% of Total Military Carbonated Beverage Sales.



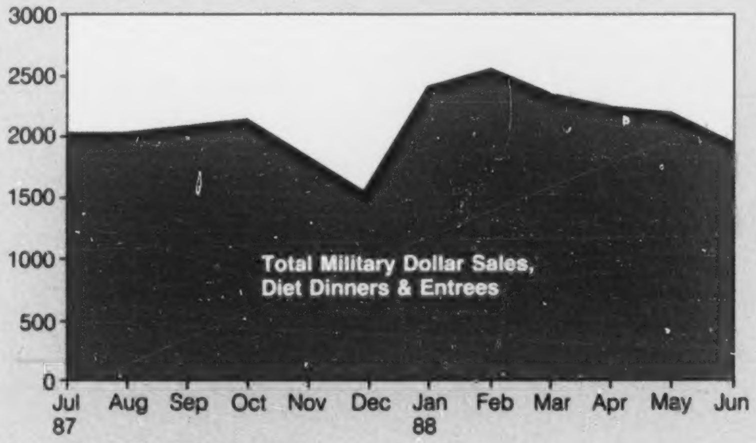
Source: Military Audits of Market Information, Inc.

Weight Watchers and Lean Cuisine Dominate the Frozen Diet Dinner and Entree Market.



Source: Military Audits of Market Information, Inc.

New Year's Resolutions Mean Good News For Diet Products.



Source: Military Audits of Market Information, Inc.

re-written to reduce fat and sodium levels.

This program has included a massive education effort for dining facility managers and Army personnel. Dining facilities have since added salad bars, breakfast fitness bars (serving more fruit and low-fat breakfast sandwiches of turkey and tuna) and more low calorie desserts to their menus.

Military health programs have also extended to the home. The Army provides diet and exercise information specifically targeted for the military family. Davant says the Army is finding that non-military spouses are becoming more diet-conscious as a result.

Kraft believes that it sells more low calorie items to the military because they are much more health and diet-conscious than any other segment of the population.

Retirees "Lighten" Up

Commissaries are also catering to an increasing number of retirees. According to Duell, military retired personnel buy mostly low-cal and low-sodium products. To meet the needs of this growing senior citizen population more effectively, Navy commissaries have begun a beef trimming program. Only 1/8-inch of fat is left on the meat.

The overall popularity of light foods, concludes Lewis Stroud, director of U.S. Marine Corps East Coast Commissary Complex, is so great because they appeal to all age groups. "You don't need to have a medical condition or be overweight to be health conscious," he observes.

"Light" the Aisles

Manufacturers are finding that low-cal products sell best when positioned as healthy food choices. Packing and advertising increasingly reflects this as more and more reduced-calorie items are also produced with lower sodium, fat and cholesterol levels. Advertising a product as "diet food" tends to reduce its appeal to the dieting population and sometimes stigmatizes it as being less tasty.

According to Phelps, Kraft doesn't encourage selling their light products in specific "diet aisle" sections. They have found that selling them with similar "regular" products increases sales and gives consumers an opportunity to see what healthy alternatives are available.

Phelps believes a stigma is attached to diet aisles. "You only shop from that aisle if you're on a diet," he says. Many people would miss these alternatives if they were sold exclusively from diet designated isles. Many choose low-cal, low-fat and low-sodium items even if they don't consider themselves officially on a diet.

Duell feels that shoppers get confused when light products are sold in diet isles. "In many cases you really can't tell if a product is diet, low-sodium, fat or cholesterol, or all four," he explains.

Marine and Navy commissaries have diet aisles which display a sampling of low-cal items. However, these items are also sold along with their "regular" counterparts throughout the store. The majority of military commissaries do stock special diet items such as weight-loss drinks and diet pills, but they tend to be "slow moving" products, according to Duell.

"Light" Advertising

The Army and Marine commissaries don't use special tags to identify foods as being low calorie or sodium. They rely, for the most part, on manufacturers' labels to convey the message.

Navy and Air Force commissaries, however, have found special shelf tags identifying fitness foods to be popular. Marine commissaries use a Nutri-Guide labeling system which alerts consumers through color-coded tags to low-sodium, calories and modified fat products.

In honor of National Nutrition Month, Air Force and Army commissaries promote light products with manufacturers' discounts on many popular light foods each March. Circulars are printed and special displays highlight these products.

"Light" Seasons

Studies conducted by Military Audits of Market Information, Inc., show that more money is spent on diet dinners and entrees from January through February than at any other time of the year. New Year's resolutions and a season of over-eating may have a big influence on post-holiday purchases.

Duell has found more calorie-control purchases from January to June; increased junk food sales during the summer months; and, of course, more holiday-type purchases—flour, sugar, ham and turkey—in November and December.

Light food buying trends, according to reported CONUS military purchases from 1987–88, are lowest from October through December. However, some light food purchases (such as cheese, salad dressing and jellies) remain steady throughout the year, according to a spokesperson for Kraft.

"Lighting" Up The Future

As a leader in fitness, the military has begun an extensive effort to educate its personnel in nutrition and good health. Through these efforts, the practice of eating foods low in cholesterol, sodium, fat and calories is becoming a way of life, rather than a trend or a fad.

Manufacturers are responding to this new lifestyle by increasing product lines to include more and more light varieties. With its continued popularity, perhaps in the future all foods will be "light" and those that aren't will be known as "heavy." ■

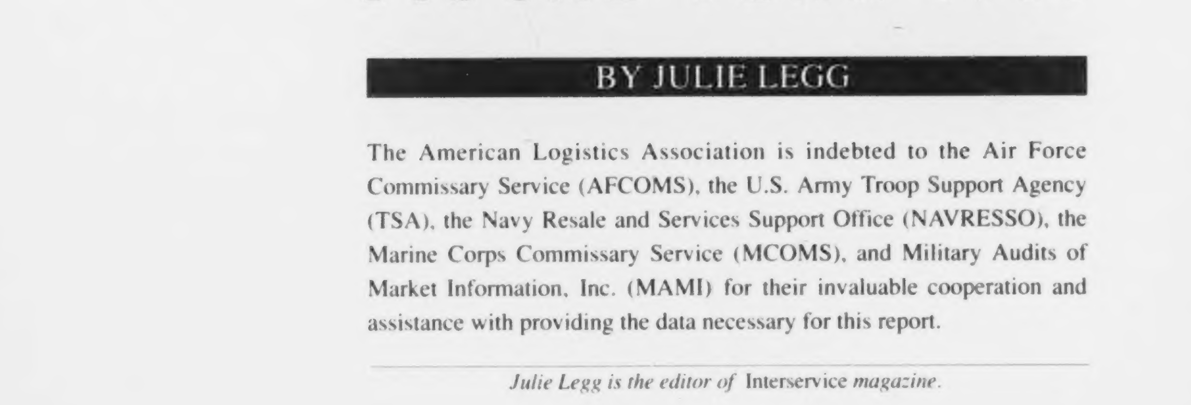
8TH ANNUAL COMMISSARY SALES REPORT

FISCAL YEAR 1988

BY JULIE LEGG

The American Logistics Association is indebted to the Air Force Commissary Service (AFCOMS), the U.S. Army Troop Support Agency (TSA), the Navy Resale and Services Support Office (NAVRESSO), the Marine Corps Commissary Service (MCOMS), and Military Audits of Market Information, Inc. (MAMI) for their invaluable cooperation and assistance with providing the data necessary for this report.

Julie Legg is the editor of Interservice *magazine.*



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Commissary Store Census

This table provides a geographic breakdown of the number of military commissary stores in operation and reporting sales as of December 31, 1988.

	CONUS
Total DoD	**236**
Army (TSA)	71
Navy	53
Air Force (AFCOMS)	99
Marine Corps	13
	Overseas
Total DoD	**195**
Army (TSA)	111
Navy	29
Air Force (AFCOMS)	53
Marine Corps	2
	Worldwide
Total DoD	**431**
Army (TSA)	182
Navy	82
Air Force (AFCOMS)	152
Marine Corps	15

All-Service Commissary Coupon Redemptions
(FY88)

CONUS	Number	% Share CONUS	% Share Worldwide	$ Value	% Share CONUS	% Share Worldwide
Air Force	107,976,065	48.2	45.0	52,414,485	50.4	46.8
Army	71,100,000	31.7	29.6	36,044,970	34.7	32.2
Navy	38,358,198	17.2	15.9	13,338,547	12.8	11.9
Marine Corps	6,628,035	2.9	2.7	2,097,489	2.1	1.8
CONUS Total	**224,062,298**	**100.0%**	**93.2%**	**$103,895,491**	**100.0%**	**92.7%**

Overseas	Number	% Share Overseas	% Share Worldwide	$ Value	% Share Overseas	% Share Worldwide
Air Force	8,411,355	52.5	3.6	4,192,811	53.2	3.7
Army	6,600,000	41.2	2.7	3,336,767	42.3	2.9
Navy	676,770	4.2	0.3	244,067	3.1	0.3
Marine Corps	328,491	2.1	0.1	112,746	1.4	0.1
Overseas Totals	**16,016,616**	**100.0%**	**6.7%**	**$7,886,391**	**100.0%**	**7.0%**

Worldwide	Number		% Share Worldwide	$ Value		% Share Worldwide
Air Force	116,387,420	–	48.4	56,607,296	–	50.6
Army	77,700,000	–	32.4	39,381,737	–	35.2
Navy	39,034,968	–	16.3	13,582,614	–	12.2
Marine Corps	6,956,526	–	2.9	2,210,235	–	2.0
Worldwide Totals	**240,078,914**	**–**	**100.0%**	**$ 111,781,882**	**–**	**100.0%**

Notes: Data may not reflect actual geographic distribution of coupon redemptions because official figures reported by region may include stores actually operating overseas but reported in CONUS, and vice-versa. Figures may not add due to rounding.

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All-Service Commissary Surcharge Expense Distribution
(FY88)

Total surcharge sales dollars	AFCOMS 112,600,000	TSA 104,000,000	Navy 43,555,000	Marine Corps 8,504,871
% surcharge $ distributed to:				
Construction	51.7	53.2	31.9	6.9
Operating & office supplies	23.1	12.9	19.8	18.5
Utilities	11.2	9.5	18.3	18.5
Maintenance & services	8.8	10.9	13.8	16.8
Store Equipment & ADP	5.2	13.5	16.2	38.3
Total	**100.0[1]**	**100.0**	**100.0**	**99.0[2]**

Notes: Details may not add to 100 percent due to rounding. Expense from transportation, linens/uniforms and other like expense items is included in data for maintenance & services. Surcharge sales dollars exclude revenue from other sources (e.g., salvage and carboard sales and cash discounts from suppliers).

[1] AFCOMS operating expenses do not equal revenue.

[2] USMC builds a new commisary every 2-3 years. USMC awarded scanning contract FY88.

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BELIEVE IT OR NOT

Which five countries overseas reported the largest DoD totals for FY88 military commissary sales? They are:

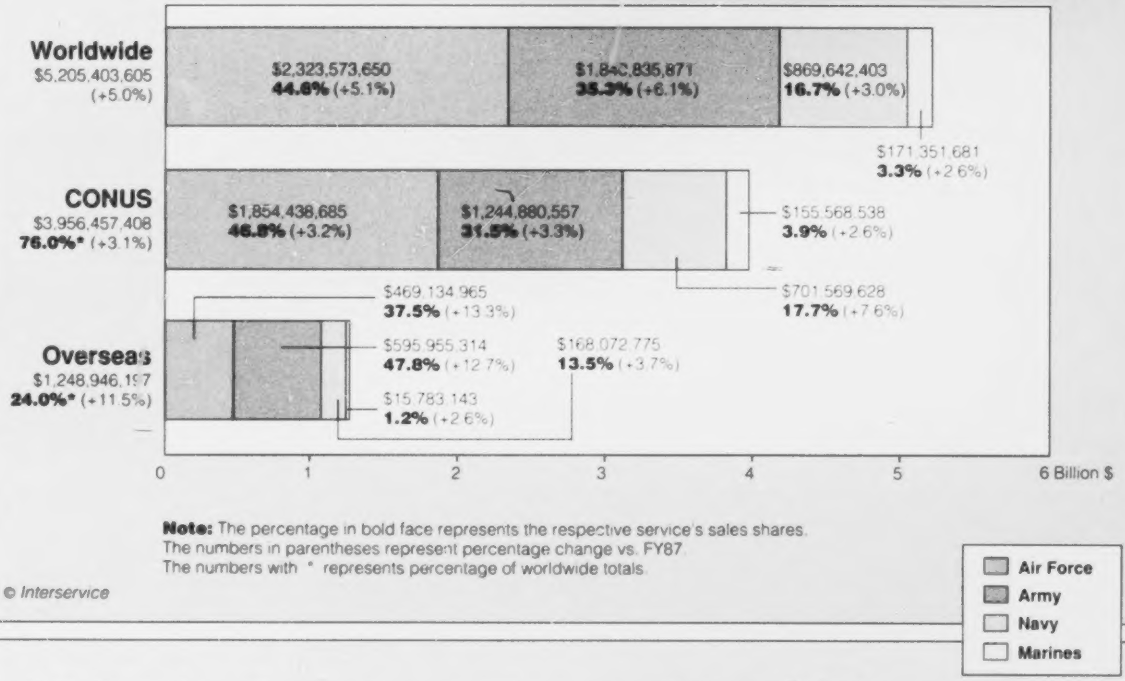
1. West Germany ($472,949,802)
2. Japan ($113,965,162)
3. Korea ($87,492,845)
4. United Kingdom ($71,073,796)
5. Italy ($37,919,346)

BELIEVE IT OR NOT

Which five U.S. States reported the largest DoD totals for FY88 military commissary sales? They are:

1. California ($643,029,532)
2. Texas ($398,946,821)
3. Virginia ($347,756,384)
4. Florida ($295,245,930)
5. Washington ($179,386,436)

All-Service Commissary Total Sales, FY88



Note: The percentage in bold face represents the respective service's sales shares.
The numbers in parentheses represent percentage change vs. FY87.
The numbers with * represents percentage of worldwide totals.

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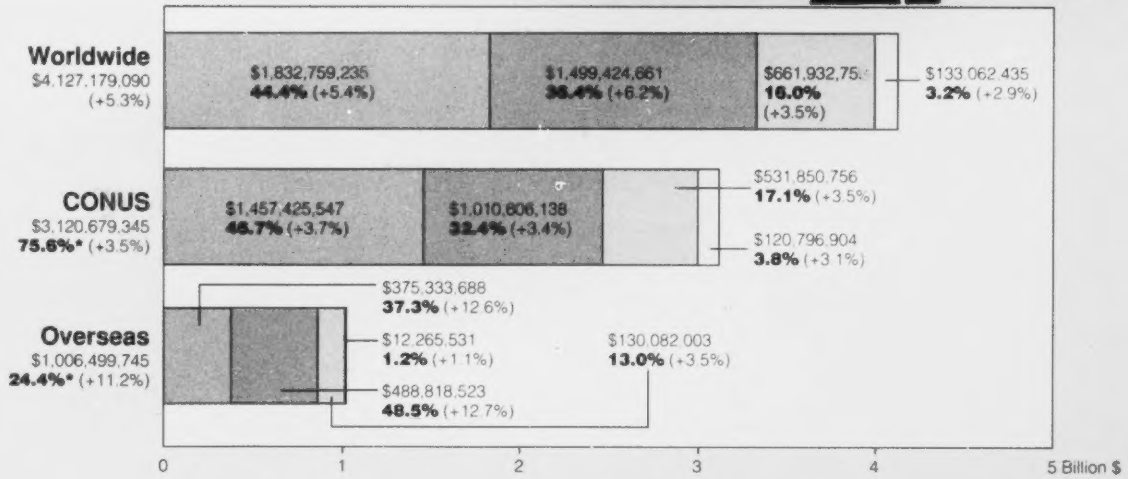
All-Service Commissary Grocery Sales, FY88



Note: The percentage in bold face represents the respective service's sales shares.
The numbers in parentheses represent percentage change vs. FY87.
The numbers with * represents percentage of worldwide totals.

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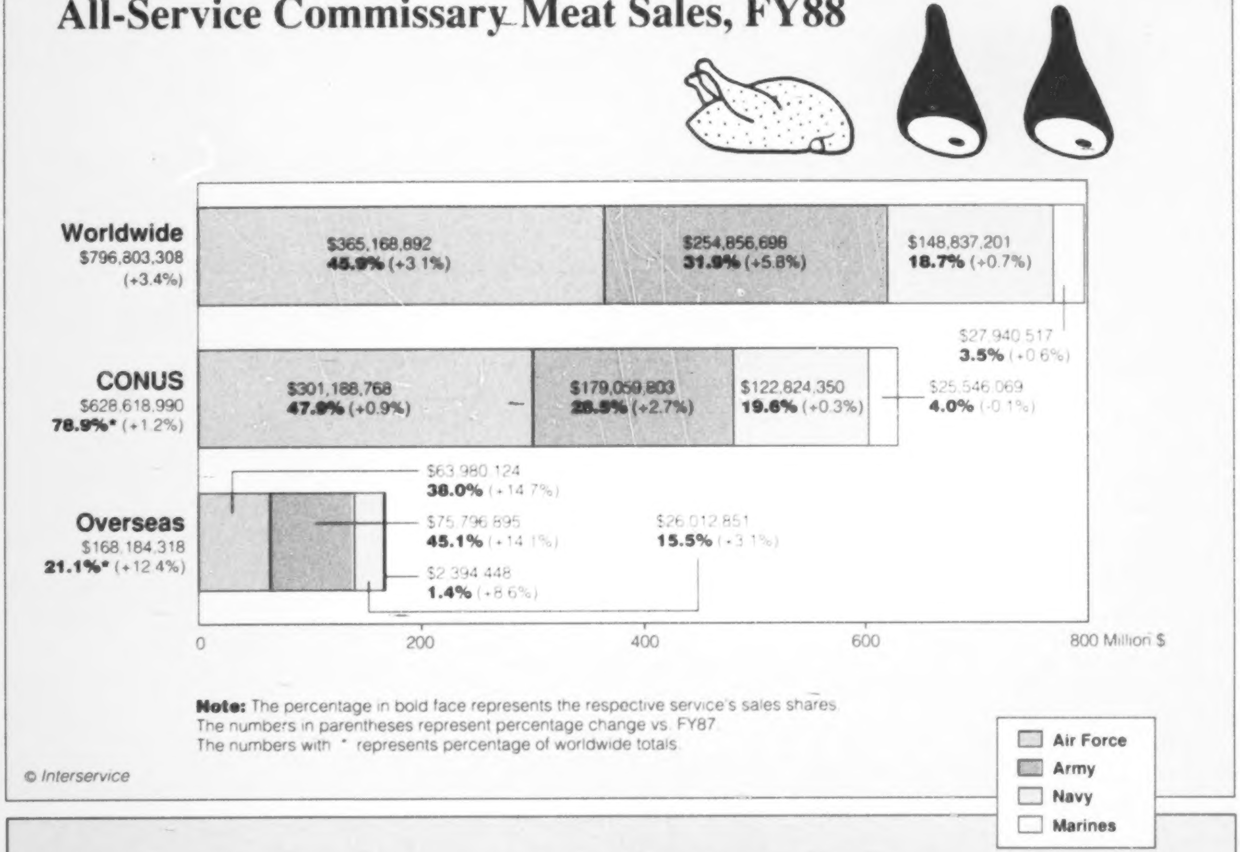
All-Service Commissary Meat Sales, FY88



Note: The percentage in bold face represents the respective service's sales shares.
The numbers in parentheses represent percentage change vs. FY87.
The numbers with * represents percentage of worldwide totals.

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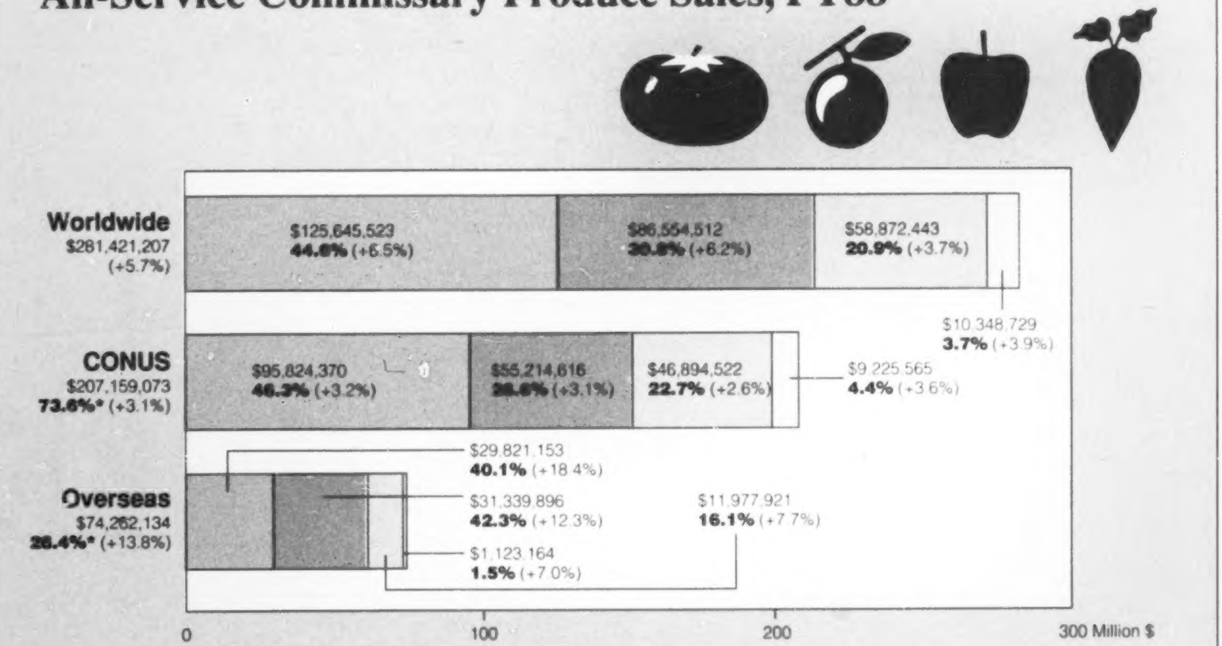
All-Service Commissary Produce Sales, FY88



Note: The percentage in bold face represents the respective service's sales shares.
The numbers in parentheses represent percentage change vs. FY87.
The numbers with * represents percentage of worldwide totals.

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CONUS DOLLAR SALES TRENDS

This information is projected to represent total dollar sales in the continental U.S. for the 12-month period ending December 1988. Scanner data is collected from an all-service 133 comstore sample representing 79% of all grocery sales.

Dollar sales trends do not necessarily match the unit movement trends for the same period. For example, of the 20 "Dry Grocery: Food" categories shown below, 14 categories are showing dollar increases while only 7 are up in unit volume.

DRY GROCERY: FOOD	Total CONUS $ Sales 12-Mo. Ending December 1988	Total CONUS % Change 88 vs. 87	TSA % Change 88 vs. 87	AFCOMS % Change 88 vs. 87	NAVRESSO % Change 88 vs. 87
Ready-To-Eat Cereals	$117,000,000	8.3%	10.0%	8.2%	8.2%
Canned Tuna	30,018,000	6.8	10.6	5.4	4.6
Baby Formula	25,888,000	0.6	8.3	-2.3	-2.7
Dessert Mixes	25,573,000	0.1	1.9	0.4	-2.6
Cooking & Salad Oil	22,654,000	1.7	2.4	2.0	1.5
Peanut Butter	22,146,000	-4.8	-1.6	-4.5	-7.5
Main Meals & Side Dishes	20,048,000	1.0	4.7	-1.7	0.6
Pasta	15,179,000	4.7	9.1	2.6	4.1
Hot Cereals	14,884,000	19.9	19.7	22.6	16.5
Baking Ingredients	13,123,000	-8.5	-7.5	-7.7	-9.3
Mayonnaise	12,991,000	0.2	3.2	1.9	-6.4
Tomato Sauce/Tomato Paste	10,449,000	-4.8	-3.0	-5.6	-5.2
Oriental Noodles	8,533,000	0.6	1.6	1.1	-2.9
Toaster Pastries	8,287,000	8.9	13.1	6.1	8.3
Mexican Table Sauces	7,675,000	9.0	11.3	6.9	10.6
Specialty & Mashed Potatoes	5,582,000	-0.8	3.3	-0.4	-5.8
Canned Pineapple	5,347,000	-3.0	-3.1	-3.9	-1.8
Flour	4,937,000	-6.0	-4.9	-6.5	-5.5
Mustard	4,127,000	0.2	1.8	0.9	-2.4
Shelf-Stable Microwaveable Lunches*	3,078,000	—	—	—	—

*New category

FROZEN FOOD	Total CONUS $ Sales 12-Mo. Ending December 1988	Total CONUS % Change 88 vs. 87	TSA % Change 88 vs. 87	AFCOMS % Change 88 vs. 87	NAVRESSO % Change 87 vs. 88
Frozen Regular Vegetables	$26,911,000	-0.8%	-1.1%	-0.2%	-1.3%
Frozen Fish & Seafood	25,481,000	-6.6	-6.7	-5.2	-8.8
Frozen Diet Dinners & Entrees	24,284,000	-4.7	-4.4	-6.6	-2.5
Frozen Pizza	22,808,000	-8.8	-11.7	-7.5	-9.8
Frozen Selected Premium Dinners	16,450,000	-17.3	-18.8	-16.5	-17.4
Frozen Novelties	16,325,000	-5.7	-12.0	-4.5	-6.7
Frozen Potatoes	13,710,000	0.8	1.5	-1.3	3.1
Frozen Boneless/Breaded Chicken	9,900,000	-2.7	-4.1	-3.0	-1.0
Frozen Raw Chicken	9,867,000	5.4	-2.7	7.6	19.5
Frozen Desserts	9,135,000	7.4	6.5	8.0	9.3
Frozen Shrimp	8,038,000	-14.1	-11.0	-15.6	-16.3
Frozen Sandwiches	4,707,000	48.3	35.3	52.0	44.2
Frozen Pies	4,618,000	-4.8	-4.2	-3.4	-6.5
Frozen Waffles	4,279,000	9.3	13.9	8.3	7.2

SOURCE: MILITARY AUDITS OF MARKET INFORMATION, INC.

DAIRY	Total CONUS $ Sales 12-Mo. Ending December 1988	Total CONUS % Change 88 vs. 87	TSA % Change 88 vs. 87	AFCOMS % Change 88 vs. 87	NAVRESSO % Change 88 vs. 87
Natural Cheese	$48,411,000	–5.1%	–4.1%	–6.8%	–3.8%
Margarines/Blends/Spreads	27,902,000	0.1	0.0	–0.1	1.6
Yogurt	16,875,000	0.9	0.0	–0.3	1.2

SNACK FOODS	Total CONUS $ Sales 12-Mo. Ending December 1988	Total CONUS % Change 88 vs. 87	TSA % Change 88 vs. 87	AFCOMS % Change 88 vs. 87	NAVRESSO % Change 88 vs. 87
Cookies	$49,177,000	–1.5%	0.3%	–3.0%	–0.8%
Crackers	36,109,000	0.3	1.0	0.0	0.9
Potato Chips	22,688,000	–3.8	–3.4	–5.7	–3.7
Snack Nuts	20,454,000	–9.7	–12.8	–7.9	–9.6
Nutritional Snacks	18,705,000	–0.1	–2.3	–2.1	5.4
Tortilla Chips	16,410,000	–0.5	–4.1	–3.7	–0.2
Unpopped Popcorn	15,537,000	14.2	14.4	14.7	10.8
Misc. Salty Snacks	10,524,000	–4.7	–5.1	–1.6	4.1
Dried Fruit	8,668,000	2.3	0.6	–1.4	–2.3
Corn Chips	5,360,000	–2.1	–7.1	–4.4	–1.5
Cheese Puffs	4,369,000	1.8	0.6	0.0	–1.1
Meat Snacks	3,553,000	0.7	–9.8	4.8	1.7
Pretzels	2,654,000	–2.1	–4.7	–1.9	–3.4

SOURCE: MILITARY AUDITS OF MARKET INFORMATION, INC.

What do numbers do?

HEALTH & BEAUTY AIDS

	Total CONUS $ Sales 12-Mo. Ending December 1988	Total CONUS % Change 88 vs. 87	TSA % Change 88 vs. 87	AFCOMS % Change 88 vs. 87	NAVRESSO % Change 88 vs. 87
Hand/Bath Soap	$30,009,000	0.1%	0.5%	1.0%	1.2%
Internal Analgesics	22,213,000	2.0	3.0	0.7	4.0
Toothpaste	20,734,000	2.1	2.6	2.6	2.6
Total Feminine Protection	20,715,000	-5.0	-6.5	-5.3	-1.9
Shampoo	18,881,000	-2.9	-1.8	-4.8	2.2
Deodorants	18,177,000	0.0	0.5	-0.9	2.1
Baby Needs	14,974,000	-1.4	0.8	-3.2	0.9
Mouthwash	12,455,000	14.0	14.7	14.4	12.7
Conditioner	8,037,000	-2.4	-4.1	-1.6	0.9
Pre-Moistened Towelettes	6,721,000	4.3	6.5	3.2	7.1
Antacids	6,194,000	1.7	-0.2	3.1	1.1
Toothbrushes	4,746,000	3.8	4.2	2.0	2.5
Eyecare/Eyedrops	3,728,000	7.7	2.8	6.4	15.8
First Aid	2,120,000	-6.0	-7.9	-4.5	-4.6
Sinus Analgesics	1,891,000	15.7	17.2	14.3	18.4
Calcium Supplements	867,609	-11.5	-14.4	-5.6	-26.0

BEVERAGE/ BEVERAGE RELATED

	Total CONUS $ Sales 12-Mo. Ending December 1988	Total CONUS % Change 88 vs. 87	TSA % Change 88 vs. 87	AFCOMS % Change 88 vs. 87	NAVRESSO % Change 88 vs. 87
Carbonated Beverages	$140,000,000	-4.1%	-4.4%	-4.4%	n/a
Ground Coffee	67,777,000	-10.4	-9.8	-10.5	-10.1
Instant Coffee	25,384,000	-14.4	-15.0	-14.3	-13.3
Canned/Bottled Fruit Drinks	20,009,000	6.2	7.7	5.4	4.8
Aseptic Packaged Drinks	14,168,000	10.4	15.9	7.8	7.9
Instant Tea	7,692,000	-8.8	-7.2	-9.4	-8.3
Coffee Non-Dairy Creamer	6,511,000	-2.8	-3.5	-1.2	-5.1
Milk Modifiers	5,228,000	-9.8	-8.3	-9.4	-9.4
Cocoa	5,081,000	-8.4	-4.5	-9.7	-7.7
Pineapple Juice & Blends	4,025,000	14.2	14.7	15.0	14.8

DRY GROCERY: NON-FOOD

	Total CONUS $ Sales 12-Mo. Ending December 1988	Total CONUS % Change 88 vs. 87	TSA % Change 88 vs. 87	AFCOMS % Change 88 vs. 87	NAVRESSO % Change 88 vs. 87
Cigarettes	$355,000,000	2.9%	3.6%	2.0%	n/a
Heavy Duty Laundry Detergent	81,228,000	-2.7	-2.9	-2.4	-2.4
Disposable Diapers	65,152,000	-2.7	-1.6	-6.0	1.3
Refuse Bags	22,274,000	13.8	13.9	14.9	11.4
Automatic Dish Detergent	15,615,000	-5.6	-2.6	-6.9	-5.5
Plastic Food Bags & Wrap	15,338,000	5.8	2.7	7.0	7.1
Paper/Plastic Plates/Cups	15,164,000	2.7	3.6	3.1	0.3
Batteries	8,276,000	16.6	9.6	10.1	59.5
Air Fresheners	6,971,000	-3.8	-2.6	-5.4	-2.4
Bathroom Cleaners	3,855,000	18.4	25.3	17.7	11.3
Laundry Starch	3,016,000	-0.8	-0.4	-0.2	-1.6
Rug & Room Deodorizers	2,634,000	-9.9	-5.0	-13.1	-11.0

SOURCE: MILITARY AUDITS OF MARKET INFORMATION, INC.

CONFECTIONARY	Total CONUS $ Sales 12-Mo. Ending December 1988	Total CONUS % Change 88 vs. 87	TSA % Change 88 vs. 87	AFCOMS % Change 88 vs. 87	NAVRESSO % Change 88 vs. 87
Chocolate Candy	$44,535,000	-3.2%	-4.0%	-0.9%	-8.5%
Gum	9,074,000	2.9	2.7	3.6	0.9
Hard Roll Candy/Breath Mints	3,288,000	7.0	5.1	7.8	4.8

PET FOODS	Total CONUS $ Sales 12-Mo. Ending December 1988	Total CONUS % Change 88 vs. 87	TSA % Change 88 vs. 87	AFCOMS % Change 88 vs. 87	NAVRESSO % Change 88 vs. 87
Dog Food, Dry	$30,579,000	-1.4%	-3.2%	4.1%	5.0%
Dog Food, Wet	18,062,000	-1.5	-2.7	0.3	-3.8
Cat Food, Wet	18,021,000	-3.8	-1.6	-0.3	-12.4
Cat Food, Dry	11,972,000	4.3	4.3	4.2	5.8
Dog/Cat Snacks	11,669,000	1.2	-0.8	2.9	0.3
Dog Food, Semi-Moist	4,101,000	-16.0	-13.8	-14.4	-22.8
Cat Food, Semi-Moist	3,458,000	-12.6	-8.5	-13.8	-12.6

SOURCE: MILITARY AUDITS OF MARKET INFORMATION, INC.

move cases... build profits!

Military Audits
OF MARKET
INFORMATION, INC.

1732 Wisconsin Avenue N.W. Washington, DC 20007 (202)944-4028

All-Service Commissary Sales by Geographic Locations

Country	DoD Total	% of DoD	Air Force	Army	Navy	USMC
Australia	660,260	0.07			660,260	
Azores	5,467,045	0.57	5,467,045			
Belgium	9,633,928	1.01	996,395	8,637,533		
Bermuda	4,222,262	0.44			4,222,262	
Canada	763,695	0.08			763,695	
Cuba	6,446,130	0.68			6,446,130	
Egypt	1,843,726	0.19		1,843,726		
Germany	472,949,802	49.54	107,061,130	365,888,672		
Greece	8,300,337	0.87	8,300,337			
Iceland	4,593,709	0.48			4,593,709	
Italy	37,919,346	3.97	11,572,364	11,029,627	15,317,355	
Japan	113,965,162	11.94	84,165,244	8,986,028	17,194,943	3,618,947
Korea	87,492,845	9.16	24,736,867	62,193,234	562,744	
Netherlands	10,876,141	1.14	5,179,849	5,696,292		
Norway	1,300,173	0.14	1,300,173			
Panama	36,386,929	3.81		36,386,929		
Philippines	44,157,229	4.63	30,183,906		13,973,323	
Saudi Arabia	3,559,853	0.37		3,559,853		
Spain	21,845,883	2.29	14,374,458		7,471,425	
Turkey	11,290,474	1.18	11,290,474			
United Kingdom	71,073,796	7.44	63,985,068		7,088,728	
Totals	**$954,748,725**	**100.00%**	**$368,613,310**	**$504,221,894**	**$78,294,574**	**$3,618,947**

State	DoD Total	% of DoD	Air Force	Army	Navy	USMC
Alabama	100,086,566	2.36	34,953,188	65,133,378		
Alaska	64,592,436	1.52	34,699,226	25,573,375	4,319,835	
Arizona	107,583,332	2.53	80,917,684	19,851,751		6,813,897
Arkansas	36,771,661	0.87	36,771,661			
California	643,029,532	15.15	252,295,854	67,492,294	259,386,967	63,854,417
Colorado	124,816,342	2.94	82,708,442	42,107,900		
Connecticut	21,530,787	0.51			21,530,787	
Delaware	19,832,534	0.47	19,832,534			
District of Columbia	46,993,676	1.11	21,020,205	25,973,471		
Florida	295,245,930	6.96	193,350,579		101,895,351	
Georgia	167,575,139	3.95	29,605,414	125,542,637	6,675,887	5,751,201
Guam	35,972,668	0.85	18,708,755		17,263,913	
Hawaii	154,267,169	3.63	47,113,674	35,361,091	59,628,208	12,164,196
Idaho	11,301,071	0.27	11,301,071			
Illinois	72,105,542	1.70	44,888,618	27,216,924		
Indiana	44,204,116	1.04	9,582,641	18,557,066	16,064,409	
Iowa						
Kansas	60,649,422	1.43	16,535,280	44,114,142		
Kentucky	77,660,083	1.83		77,660,083		
Louisiana	78,677,437	1.85	48,306,900	21,214,690	9,155,847	
Maine	22,042,683	0.52	11,822,728		10,219,955	
Maryland	121,456,321	2.86	34,033,281	71,278,438	16,144,602	
Massachusetts	35,185,657	0.83	18,462,158	16,723,499		
Michigan	31,286,227	0.74	18,479,477	12,806,750		
Minnesota						
Mississippi	52,379,951	1.23	43,055,836		9,324,115	
Missouri	30,416,917	0.72	10,060,893	20,356,024		
Montana	12,774,933	0.30	12,774,933			

Continued on page 68

State	DoD Total	% of DoD	Air Force	Army	Navy	USMC
Nebraska	32,833,574	0.77	32,833,574			
Nevada	41,252,816	0.97	38,860,487		2,392,329	
New Hampshire	20,110,562	0.47	20,110,562			
New Jersey	72,897,641	1.72	51,808,373	18,208,054	2,881,214	
New Mexico	59,772,773	1.41	~~56,041,243~~	3,731,530		
New York	78,749,299	1.86	27,033,549	37,531,337	14,184,413	
North Carolina	120,770,610	2.85	15,612,261	55,525,692		49,632,657
North Dakota	20,273,119	0.48	20,273,119			
Ohio	44,279,474	1.04	44,279,474			
Oklahoma	84,412,213	1.99	53,055,528	31,356,685		
Pennsylvania	41,747,841	0.98		32,441,290	9,306,551	
Puerto Rico	32,948,461	0.78		24,382,216	8,566,245	
Rhode Island	12,918,895	0.30			12,918,895	
South Carolina	111,920,386	2.64	54,929,256	29,216,869	20,148,483	7,625,778
South Dakota	14,735,462	0.35	14,735,462			
Tennessee	22,166,084	0.52	4,056,194		18,109,890	
Texas	398,946,821	9.40	237,608,171	150,650,032	10,688,618	
Utah	25,667,396	0.60	24,103,319	1,564,077		
Vermont						
Virginia	347,756,384	8.19	39,622,164	179,179,031	107,064,601	21,890,588
Washington	179,386,436	4.23	76,462,810	49,446,913	53,476,713	
West Virginia						
Wisconsin						
Wyoming	12,253,762	0.29	12,253,762			
Totals	**$4,244,238,141**	**100.00%**	**$1,954,960,340**	**$1,330,197,239**	**$791,347,828**	**$167,732,734**

BELIEVE IT OR NOT

Which are the 20 overseas military commissaries with the highest ACVs in FY88? They are:

1. Navy's Pearl Harbor, HI (4.05%)
2. AFCOMS's Hickam AFB, HI (3.77%)
3. TSA's Yongsan, Korea (3.17%)
4. TSA's Schofield Barracks, HI (2.43%)
5. AFCOMS's Clark AB, PI (2.42%)
6. AFCOMS's Ramstein AB, FRG (2.39%)
7. AFCOMS's Kadena, Japan (2.13%)
8. AFCOMS's Elmendorf AFB, AK (2.10%)
9. TSA's Ft. Buchanan, PR (1.95%)
10. TSA's Ft. Corozal, Panama (1.76%)
11. AFCOMS's Osan AB, Korea (1.73%)
12. AFCOMS's Camp Butler, Korea (1.72%)
13. TSA's Frankfurt, FRG (1.56%)
14. TSA's Fuerth, FRG (1.53%)
15. AFCOMS's Andersen AFB, Guam (1.50%)
16. TSA's Hanau, FRG (1.48%)
17. AFCOMS's RAF Lakenheath (1.44%)
18. AFCOMS's Rhein-Main AB, FRG (1.43%)
19. AFCOMS's Vogelweh AB, FRG (1.42%)
20. TSA's Heidelberg, FRG (1.39%)

Air Force Commissary Coupon Redemptions
(FY88)

CONUS	Number	% Share CONUS	% Share Worldwide	$ Value	% Share CONUS	%Share Worldwide
California	15,046,419	13.9	12.9	6,967,822	13.3	12.3
North Central	13,908,298	12.9	12.0	6,578,960	12.5	11.6
Northeast	13,125,057	12.2	11.3	6,676,630	12.7	11.8
Northwest*	8,547,482	7.9	7.3	4,206,711	8.0	7.5
South Central	17,998,635	16.7	15.5	8,698,594	16.6	15.4
Southern	25,611,467	23.7	22.0	12,959,365	24.8	22.9
Southwest	13,738,707	12.7	11.8	6,326,403	12.1	11.1
CONUS Totals	**107,976,065**	**100.0%**	**92.8%**	**$52,414,485**	**100.0%**	**92.6%**

Overseas	Number	% Share CONUS	% Share Worldwide	$ Value	% Share CONUS	%Share Worldwide
Andersen AFB, Guam	225,010	2.7	0.2	94,714	2.3	0.2
Ankara, Turkey	22,957	0.3	N	13,819	0.3	N
Aviano AB, Italy	80,868	1.0	0.1	38,802	0.9	0.1
Clark AB, PI	616,325	7.3	0.5	287,572	6.9	0.5
Germany Complex	2,147,068	25.5	1.8	958,447	22.9	1.7
Greece Complex	97,781	1.2	0.1	78,483	1.9	0.1
Hickam AFB, HI	1,612,902	19.2	1.4	772,595	18.4	1.4
Incirlik, Turkey	52,285	0.6	N	24,855	0.6	N
Izmir, Turkey	25,055	0.3	N	14,649	0.3	N
Lajes Field, Azores	112,961	1.3	0.1	44,359	1.1	N
Misawa AB, Japan	197,753	2.4	0.2	74,624	1.8	0.1
Okinawa Complex	998,783	11.9	0.8	483,635	11.5	0.9
Osan & Kunsan, Korea	343,382	4.1	0.3	306,354	7.3	0.5
San Vito & Comiso, Italy	63,725	0.7	N	35,641	0.9	N
Soesterber, NL	86,974	1.0	0.1	43,185	1.0	0.1
Spain Complex	276,182	3.3	0.2	252,583	6.0	0.4
UK Complex	1,223,215	14.5	1.0	570,637	13.6	1.0
Yokota AB, Japan	228,129	2.7	0.2	97,857	2.3	0.2
Overseas Totals	**8,411,355**	**100.0%**	**7.2%**	**$ 4,192,811**	**100.0%**	**7.4%**
Worldwide Totals	**116,387,420**		**100.0%**	**$56,607,296**		**100.0%**

Notes: Details may not add to totals due to rounding. N = Not significant, less than one-tenth of one percent.
*Includes Alaska stores

BELIEVE IT OR NOT

Of the CONUS military commissaries for each service, do you know which reported the highest FY88 store increase? They are:

1. Navy's Governor's Island, NY (+155.5%)
2. Army's Ft. Drum, NY (+51.4%)
3. Air Force's Avon Park, FL (+21.0%)
4. Marine Corp's Camp Pendleton, CA (+8.3%)

Air Force Commissary Sales
(FY88)

CONUS

California Region/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Beale AFB, CA	6	14,571,200	78	18	4	1.2	15,392	79	0.37
Castle AFB, CA	7	19,444,468	80	16	4	0.5	22,760	71	0.49
Edwards AFB, CA	6	14,572,207	78	17	5	5.7	19,852	61	0.37
George AFB, CA	6	15,984,456	77	18	5	3.5	13,207	101	0.40
Indian Springs AFAF, NV	1	20,434	100	0	0	/a	1,720	12	/a
Los Angeles AFB, CA	5	11,509,131	80	15	5	–2.9	23,270	41	0.29
March AFB, CA	8	28,578,351	78	17	5	3.1	28,810	83	0.72
Mather AFB, CA	8	32,462,275	77	17	6	2.4	30,516	89	0.82
McClellan AFB, CA	8	30,829,591	78	17	5	8.1	18,248	141	0.78
Nellis AFB, NV	8	38,840,053	80	15	5	1.2	28,647	113	0.98
Norton AFB, CA	8	29,728,009	78	17	5	6.5	29,053	85	0.75
Travis AFB, CA	8	36,136,186	77	17	6	4.0	34,372	88	0.91
Vandenberg AFB, CA	7	18,479,980	79	16	5	–2.9	33,319	46	0.47
Region Totals		**$291,156,341**	**78%**	**17%**	**5%**	**2.8%**	**299,166**	**$81**	**7.36%**

North Central Region/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Belle Fourche AFS, SD	1	95,242	100	0	0	/c	2,015	4	/a
Calumet AFS, MI	1	300,266	100	0	0	–9.4	1,797	14	/a
Chanute AFB, IL	6	13,978,057	79	16	5	2.1	25,144	46	0.35
Dickinson AFS, ND	1	217,484	100	0	0	n/a	2,015	9	/a
Ellsworth AFB, SD	6	14,640,220	79	16	5	4.3	17,596	69	0.37
F.E. Warren AFB, WY	5	11,883,915	81	15	4	7.4	15,484	64	0.30
Forsyth AFS, MT	1	190,791	100	0	0	–0.5	2,015	8	/a
Grand Forks AFB, ND	5	10,506,640	79	16	5	8.9	16,422	53	0.27
Grissom AFB, IN	5	9,582,641	80	16	4	4.3	19,554	41	0.24
K.I. Sawyer AFB, MI	4	9,092,334	78	17	5	3.6	17,428	43	0.23
McConnell AFB, KS	6	16,535,280	82	14	4	7.[illegible]	23,100	60	0.42
Minot AFB, ND	5	9,548,995	80	15	5	–1.5	15,329	52	0.24
Offutt AFB, NE	8	32,833,574	80	15	5	2.6	32,795	83	0.83
Port Austin AFS, MI	1	256,468	100	0	0	–9.0	1,400	15	0.01
Scott AFB, IL	8	30,910,561	77	17	6	11.6	27,339	94	0.78
Whiteman AFB, MO	5	10,060,893	81	15	4	–0.4	18,313	46	0.25
Wright-Patterson AFB, OH	8	44,279,474	79	16	5	2.2	38,100	97	1.12
Wurtsmith AFB, MI	4	8,830,409	81	15	4	4.2	17,133	43	0.22
Region Totals		**$223,743,244**	**79%**	**16%**	**5%**	**4.6%**	**292,979**	**$64**	**5.64%**

/a Less than 0.1%
/c Opened FY88
n/a Totals not meaningful for comparison purposes; data not available

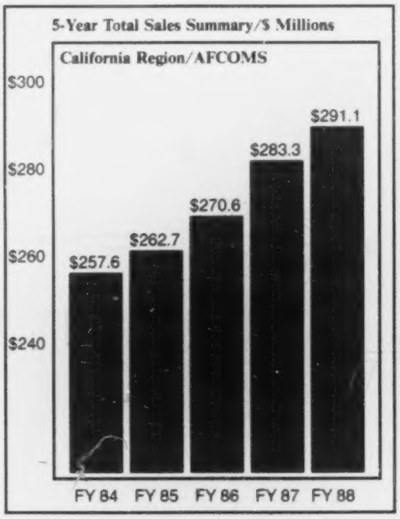
Store classes for Air Force commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000
Class 2 $100,001–$300,000
Class 3 $300,001–$500,000
Class 4 $500,001–$750,000
Class 5 $750,001–$1,000,000
Class 6 $1,000,001–$1,500,000
Class 7 $1,500,001–$2,000,000
Class 8 Over $2,000,000

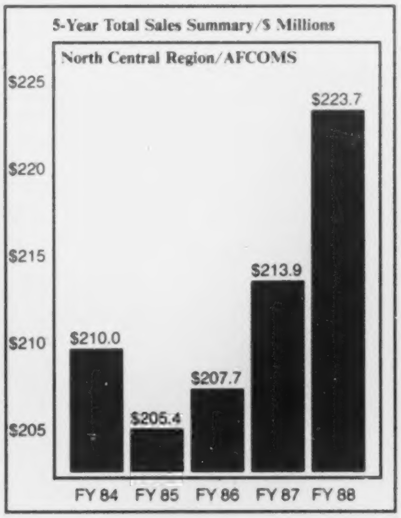
Air Force Commissary Sales
(FY88)

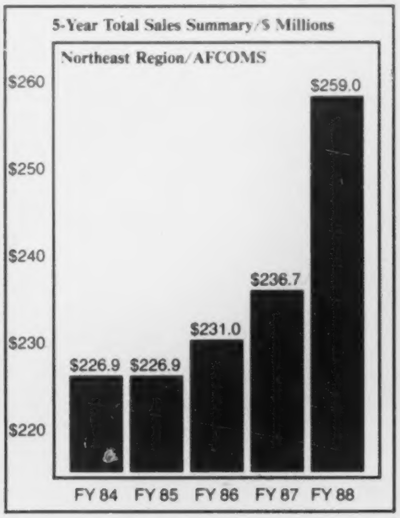
CONUS

Northeast Region/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	% of Store Total Meat	% of Store Total Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Andrews AFB, MD	8	34,033,281	76	18	6	-5.0	28,827	103	0.86
Bangor AFB, ME	2	2,423,719	82	14	4	/c	7,273	28	/a
Bolling AFB, DC	7	21,020,205	75	18	7	5.1	28,365	62	0.53
Dover AFB, DE	7	19,832,534	80	16	4	4.9	25,947	64	0.50
Griffiss AFB, NY	6	15,112,576	80	15	5	1.2	16,231	78	0.38
Hanscom AFB, MA	7	18,462,158	78	16	6	0.7	36,512	42	0.47
Langley AFB, VA	8	39,622,164	77	17	6	2.3	27,813	119	1.00
Loring AFB, ME	5	29,399,009	80	15	5	2.1	19,052	41	0.24
McGuire AFB, NJ	8	51,808,373	78	17	5	4.6	41,162	105	1.31
Pease AFB, NH	7	20,110,562	81	15	4	1.3	29,911	56	0.51
Plattsburgh AFB, NY	5	11,920,973	80	15	5	4.8	12,906	77	0.30
Seymour-Johnson AFB, NC*	6	15,299,895	77	18	5	1.2	17,035	75	0.39
Region Totals		**$259,045,449**	**78%**	**17%**	**5%**	**9.4%**	**291,034**	**$74**	**6.54%**







Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY88 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

/a Less than 0.1%
/c Opened FY88
n/a Totals not meaningful for comparison purposes
* Merged into region in FY88

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

Class 1	Up to $100,000
Class 2	$100,001-$300,000
Class 3	$300,001-$500,000
Class 4	$500,001-$750,000
Class 5	$750,001-$1,000,000
Class 6	$1,000,001-$1,500,000
Class 7	$1,500,001-$2,000,000
Class 8	Over $2,000,000

Air Force Commissary Sales
(FY88)

CONUS

Northwest Region/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Conrad AFS, MT	1	95,403	100	0	0	/c	2,015	4	/a
Fairchild AFB, WA	7	24,304,155	81	14	5	4.3	31,139	65	0.59
Havre AFS, MT	1	189,980	100	0	0	2.3	2,015	8	/a
Hill AFB, UT	7	24,103,319	79	15	6	5.4	17,112	117	0.61
Makah AFS, WA	1	190,954	98	2	0	/a	1,376	12	/a
Malmstrom AFB, MT	5	12,298,759	80	15	5	5.2	25,301	41	0.31
McChord AFB, WA	8	51,967,701	79	16	5	7.0	47,705	91	1.31
Mt. Home AFB, ID	5	11,301,071	80	15	5	-0.8	16,449	57	0.29
Powell AFS, WY	1	369,847	100	0	0	5.4	2,566	12	0.01
Region Totals		**$124,821,189**	**79%**	**15%**	**6%**	**5.1%**	**145,678**	**$71**	**3.13%**

South Central Region/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Altus AFB, OK	5	10,150,408	78	16	6	0.7	19,880	43	0.26
Bergstrom AFB, TX	8	34,180,451	77	17	6	4.4	31,040	92	0.86
Brooks AFB, TX	4	6,371,177	80	16	4	-4.8	16,216	83	0.16
Carswell AFB, TX	8	48,256,526	79	16	5	0.8	48,561	83	1.22
Dyess AFB, TX	6	16,281,305	79	16	5	4.0	22,362	61	0.41
Goodfellow AFB, TX	4	8,691,946	80	15	5	4.6	11,660	62	0.22
Kelly AFB, TX	4	7,639,631	79	17	4	-7.8	19,176	33	0.19
Lackland AFB, TX	8	43,524,904	78	17	5	2.9	41,488	87	1.10
Laughlin AFB, TX	3	5,228,760	81	14	5	-1.7	17,800	24	0.13
Randolph AFB, TX	8	41,563,484	78	16	6	4.0	30,860	112	1.05
Sheppard AFB, TX	7	18,846,158	78	16	6	0.4	24,317	65	0.48
Tinker AFB, OK	8	38,151,298	80	15	5	3.9	37,228	85	0.96
Vance AFB, OK	3	4,753,822	78	17	5	-0.1	11,000	36	0.12
Region Totals		**$283,639,870**	**79%**	**16%**	**5%**	**2.2%**	**331,588**	**$71**	**7.17%**

BELIEVE IT OR NOT

Which five U.S. States have no commissaries at all?

1. Iowa
2. Minnesota
3. Vermont
4. West Virginia
5. Wisconsin

/a Less than 0.1%
/b Closed FY88
/c Opened FY88
n/a Totals not meaningful for comparison purposes
* Data not available

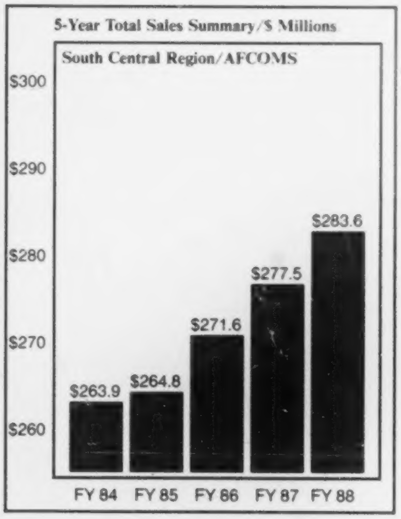
Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

Air Force Commissary Sales
(FY88)

Southern Region/AFCOMS

Store*	Store Class	Total Store $ Sales	% of Store Total Grocery	% of Store Total Meat	% of Store Total Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Arnold AFB, TN	3	4,056,194	84	13	3	1.1	8,040	42	0.10
Avon Park, FL	1	1,411,809	100	0	0	21.0	3,012	39	0.04
Barksdale AFB, LA	8	35,675,083	79	16	5	-0.2	35,304	84	0.90
Charleston AFB, SC	8	28,169,234	78	17	5	6.4	30,821	76	0.71
Columbus AFB, MS	4	9,840,080	78	17	5	-3.8	20,643	40	0.25
Eaker AFB, AR	5	8,150,232	79	16	5	2.0	14,108	48	0.21
Eglin AFB, FL	8	34,612,035	78	16	6	6.4	23,086	125	0.87
England AFB, LA	6	12,631,817	78	17	5	3.9	9,863	107	0.32
Fort Fisher AFS, NC	1	312,366	100	0	0	/b	3,239	8	0.01
Gunter AFB, AL	5	10,859,406	77	18	5	-3.1	17,330	52	0.27
Homestead AFB, FL	8	28,466,282	77	17	6	7.3	27,600	86	0.72
Hurlburt AFB, FL	6	12,765,059	80	15	5	6.2	11,917	89	0.32
Keesler AFB, MS	8	33,215,756	80	15	5	-0.8	30,689	90	0.84
Little Rock AFB, AR	8	28,621,429	79	16	5	-1.8	38,342	62	0.72
MacDill AFB, FL	8	58,353,228	78	17	5	14.7	25,280	192	1.47
Maxwell AFB, AL	7	24,093,782	78	16	6	7.6	31,580	64	0.61
Moody AFB, GA	5	11,053,486	78	18	5	/a	20,064	46	0.28
Myrtle Beach AFB, SC	5	10,927,247	77	18	5	1.5	11,272	81	0.28
Patrick AFB, FL	8	36,579,367	77	17	6	3.4	29,592	103	0.92
Robins AFB, GA	7	18,551,928	79	16	5	-2.6	26,522	58	0.47
Shaw AFB, SC	6	15,832,775	76	19	5	/a	15,000	88	0.40
Tyndall AFB, FL	7	21,162,799	78	17	5	-0.6	25,981	68	0.53
Region Totals	**$**	**445,341,394**	**79%**	**16%**	**5%**	**n/a**	**459,285**	**$81**	**11.25%**



BELIEVE IT OR NOT

Can you name the five military commissaries with the largest amount of total square feet? They are:

1. Carswell AFB, TX (48,561)
2. McChord AFB, WA (47,705)
3. Lackland AFB, TX (41,488)
4. McGuire AFB, NJ (41,162)
5. Imperial Beach, CA (38,600)

/a Less than 0.1%.
/b Closed FY88.
/c Opened FY88.
n/a Totals not meaningful for comparison purposes.
* Delta-Gulf and Southeast Regions merged in FY88.

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

Class 1	Up to $100,000	Class 4	$500,001-$750,000	Class 7	$1,500,001-$2,000,000
Class 2	$100,001-$300,000	Class 5	$750,001-$1,000,000	Class 8	Over $2,000,000
Class 3	$300,001-$500,000	Class 6	$1,000,001-$1,500,000		

Air Force Commissary Sales
(FY88)

CONUS

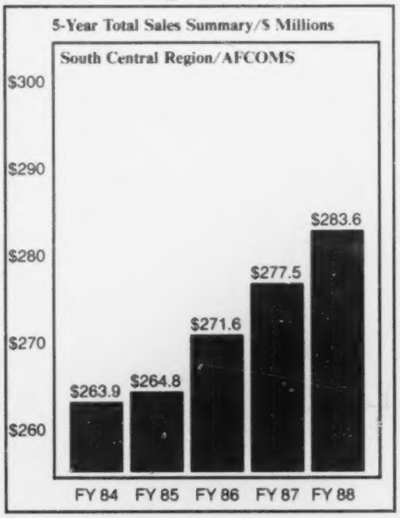
Southwest Region/AFCOMS

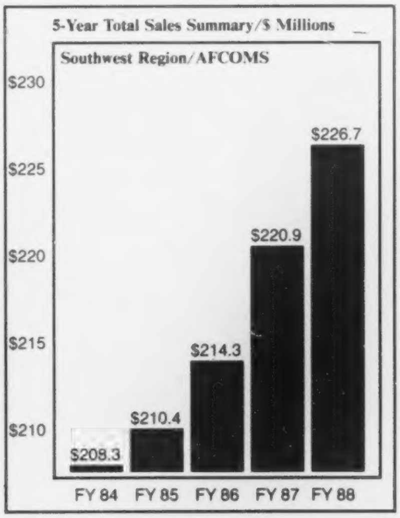
Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Cannon AFB, NM	4	8,684,189	79	16	5	4.7	18,100	40	0.22
Davis-Monthan AFB, AZ	8	32,042,301	79	15	6	−1.1	25,181	106	0.81
Gila Bend AFS, AZ	1	395,493	100	0	0	−3.6	2,663	12	0.01
Holbrook AFB, AZ	1	266,731	100	0	0	5.0	708	31	0.01
Holloman AFB, NM	6	14,048,365	80	15	5	1.0	25,638	46	0.36
Kirtland AFB, NM	8	33,308,689	80	15	5	2.4	26,638	104	0.84
Lowry AFB, CO	8	35,685,500	78	16	6	0.2	35,413	84	0.90
Luke AFB, AZ	8	29,339,585	80	15	5	0.4	23,700	103	0.74
Peterson AFB, CO	8	31,737,565	78	16	6	15.0	34,732	76	0.80
Reese AFB, TX	4	7,023,829	79	16	5	3.4	18,700	31	0.18
USAF Academy, CO	6	15,285,377	76	16	8	−3.1	16,767	76	0.39
Williams AFB, AZ	7	18,873,574	80	16	4	3.8	22,630	70	0.48
Region Totals		**$226,691,198**	**79%**	**16%**	**5%**	**2.6%**	**250,870**	**$73**	**5.73%**
CONUS AFCOMS Totals		**$1,854,438,685**	**79%**	**16%**	**5%**	**3.2%**	**2,070,600—**	**$75**	**46.83%**

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY88 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000





Air Force Commissary Sales
(FY88)

OVERSEAS

Alaska Stores/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Eielson AFB, AK	4	8,524,058	79	15	6	-1.0	9,794	73	0.68
Elmendorf AFB, AK	8	26,175,168	75	18	7	5.8	31,285	70	2.10
Totals		**$34,699,226**	**76%**	**17%**	**7%**	**4.0%**	**41,079**	**$70**	**2.78%**

Central Europe Complex/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Bitburg AB, FRG	4	9,864,980	82	12	6	10.6	8,426	98	0.79
Florennes, Belgium	1	996,395	100	0	0	18.0	1,914	43	0.08
Hahn AB, FRG	5	12,919,146	83	11	6	14.6	21,164	51	1.03
Hessisch-Oldendorf, FRG	2	1,402,909	94	0	6	3.8	3,173	37	0.11
Oslo, Norway	1	1,300,173	83	11	6	14.1	4,032	27	0.10
Pruem, FRG	1	529,941	100	0	0	13.9	1,546	29	0.04
Ramstein AB, FRG	8	29,884,044	79	13	8	11.4	31,468	79	2.39
Rhein-Main AB, FRG	6	17,843,239	81	13	6	17.9	19,448	76	1.43
Sembach AB, FRG	4	7,175,823	79	14	7	15.2	8,308	72	0.57
Spangdahlem AB, FRG	4	9,490,484	81	13	6	13.6	11,561	68	0.76
Trier, FRG	1	154,526	100	0	0	-5.1	1,476	9	0.01
Vogelweh AB, FRG	6	17,796,038	79	15	6	4.0	17,349	85	1.42
Complex Totals		**$109,357,698**	**81%**	**13%**	**6%**	**11.8%**	**129,865**	**$70**	**8.76%**

Greece Complex/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Hellenikon	2	2,123,206	90	8	2	/a	8,395	21	0.17
Hellenikon Branch	2	3,878,865	95	0	5	17.3	8,199	39	0.31
Iraklion	2	1,978,945	85	9	6	16.2	4,206	39	0.16
Nea Makri	1	319,321	100	0	0	n/a	1,203	8	/a
Complex Totals		**$8,300,337**	**92%**	**4%**	**4%**	**10.9%**	**22,003**	**$27**	**0.64%**

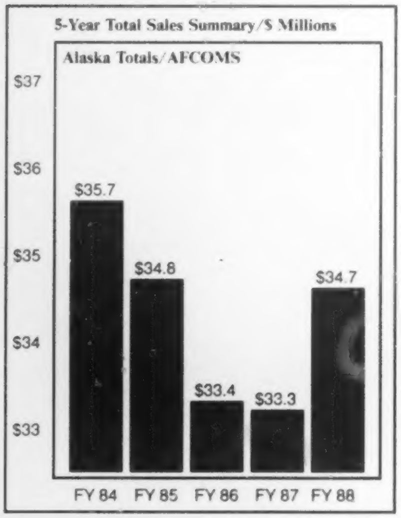
Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY88 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

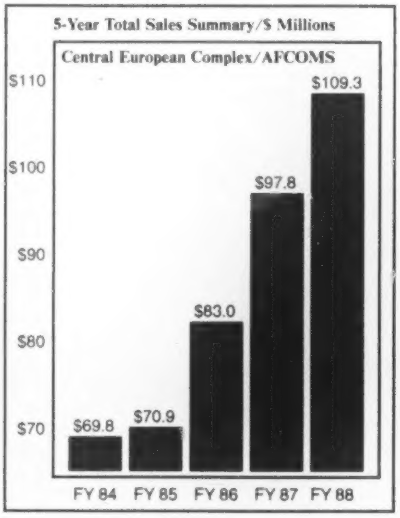
/a	Less than 0.1%
/b	Closed FY88
/c	Opened FY88
n/a	Totals not meaningful for comparison purposes
*	Data not available

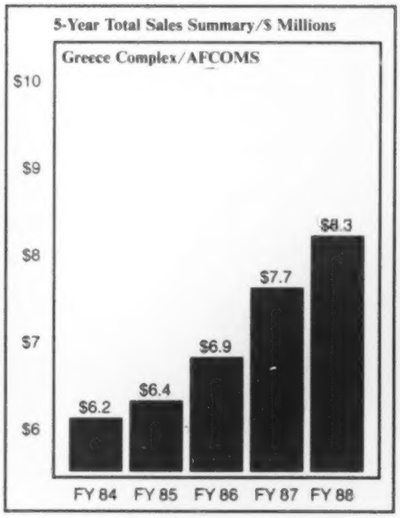
Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

Class 1	Up to $100,000
Class 2	$100,001-$300,000
Class 3	$300,001-$500,000
Class 4	$500,001-$750,000
Class 5	$750,001-$1,000,000
Class 6	$1,000,001-$1,500,000
Class 7	$1,500,001-$2,000,000
Class 8	Over $2,000,000

Air Force Commissary Sales
(FY88)







/a Less than 0.1%
/b Closed FY88
/c Opened FY88
n/a Totals not meaningful for comparison purposes
* Data not available

Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

Class 1 Up to $100,000
Class 2 $100,001-$300,000
Class 3 $300,001-$500,000
Class 4 $500,001-$750,000
Class 5 $750,001-$1,000,000
Class 6 $1,000,001-$1,500,000
Class 7 $1,500,001-$2,000,000
Class 8 Over $2,000,000

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Air Force Commissary Sales
(FY88)

Okinawa Complex/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Camp Butler (Foster)	6	21,445,368	79	14	7	n/a	15,681	114	1.72
Camp Courtney	2	1,329,977	79	15	6	/c	12,746	9	0.11
Kadena	8	26,621,944	78	14	8	-5.4	29,129	76	2.13
Kinser Whse Center	3	6,176,122	100	0	0	12.5	0	0	0.49
Complex Totals		**$55,573,411**	**81%**	**12%**	**7%**	**12.6%**	**57,556**	**$80**	**4.45%**

Spain Complex/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Royal Oaks	1	811,588	100	0	0	11.1	1,315	51	0.06
Torrejon AB	5	10,603,649	83	11	6	14.9	15,839	56	0.85
Zaragoza AB	2	2,959,221	85	11	4	6.0	3,883	64	0.24
Complex Totals		**$14,374,458**	**84%**	**11%**	**5%**	**12.7%**	**21,037**	**$57**	**1.15%**

United Kingdom Complex/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
RAF Alconbury	4	8,536,649	80	14	6	18.7	22,257	32	0.68
RAF Bentwaters	4	9,591,498	79	14	7	9.3	12,979	62	0.77
RAF Burtonwood	1	240,600	100	0	0	15.5	1,410	14	0.02
RAF Chicksands	2	3,134,304	81	14	5	17.6	7,036	37	0.25
RAF Fairford	2	3,234,363	79	15	6	12.1	8,392	32	0.26
RAF Greenham Common	3	4,569,462	79	14	7	18.4	20,405	19	0.37
RAF Lakenheath	6	17,942,951	80	14	6	17.9	16,540	90	1.44
RAF Menwith Hill	2	2,160,021	78	14	8	17.8	2,926	62	0.17
RAF Mildenhall	1	1,029,763	100	0	0	n/a	2,325	20	/a
RAF Sculthorpe	1	520,502	100	0	0	42.0	3,148	14	0.04
RAF Upper Heyford	5	11,883,659	80	15	5	20.6	12,624	78	0.95
RAF Wethersfield	1	1,141,296	81	14	5	7.3	3,945	24	0.09
Complex Totals		**$63,985,068**	**80%**	**14%**	**6%**	**17.5%**	**113,987**	**$47**	**5.04%**

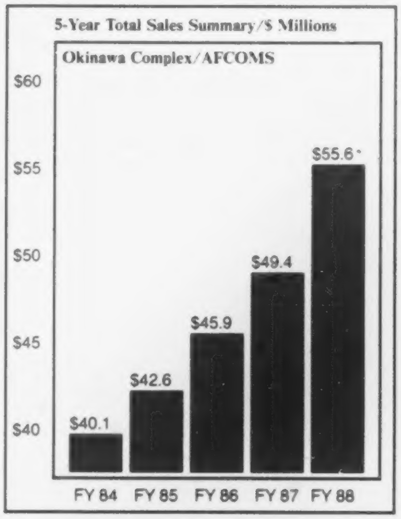
/a Less than 0.1%
n/a Totals not meaningful for comparison purposes
/c Opened FY88

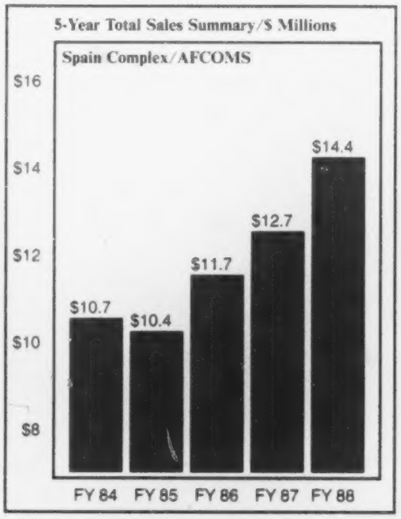
Store classes for Air Force commissaries are based upon total average monthly sales, as follows:

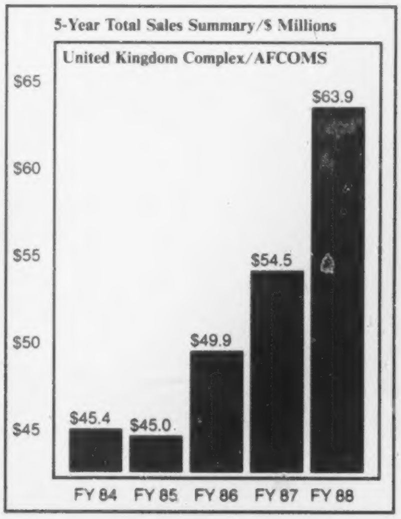
Class	Sales
Class 1	Up to $100,000
Class 2	$100,001-$300,000
Class 3	$300,001-$500,000
Class 4	$500,001-$750,000
Class 5	$750,001-$1,000,000
Class 6	$1,000,001-$1,500,000
Class 7	$1,500,001-$2,000,000
Class 8	Over $2,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY88 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

Air Force Commissary Sales
(FY88)







Non-Complex Stores Overseas/AFCOMS

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Andersen AFB, Guam	6	18,708,755	79	14	7	11.4	19,462	80	1.50
Ankara, Turkey	2	2,999,587	88	8	4	16.1	7,648	33	0.24
Aviano AB, Italy	3	5,065,844	81	12	7	11.8	10,786	39	0.41
Clark AB, PI	8	30,183,906	80	13	7	5.9	23,730	106	2.42
Comiso AS, Italy	1	2,858,833	85	10	5	n/a	10,422	23	0.23
Decimomannu, Italy	1	49,422	100	0	0	/c	2,419	5	/a
Hickam AFB, HI	8	47,113,674	78	16	6	27.1	27,032	145	3.77
Incirlik, Turkey	3	5,658,045	87	9	4	9.2	13,683	34	0.45
Izmir, Turkey	2	2,632,842	82	15	3	22.6	5,078	43	0.21
Kunsan AB, Korea	2	3,176,844	100	0	0	27.3	4,752	44	0.22
Lajes Field, Azores	3	5,467,045	87	9	4	1.4	14,200	32	0.44
Misawa AB, Japan	6	13,146,361	78	14	8	9.0	22,496	49	1.05
Osan AB, Korea	7	21,560,023	74	19	7	13.6	20,250	89	1.73
San Vito AS, Italy	2	3,598,265	84	9	7	8.5	6,338	47	0.29
Soesterberg, NL	3	25,179,849	82	12	6	11.9	9,999	34	0.41
Yokota AB, Japan	6	15,445,472	75	17	8	9.7	20,207	64	1.24
Stand Alone Store Totals		**$182,844,767**	**n/a**	**n/a**	**n/a**	**n/a**	**218,502**	**$70**	**14.60%**
Overseas AFCOMS Totals		**$469,134,965**	**80**	**14**	**6**	**13.3**	**604,029**	**$65**	**36.99%**
Worldwide AFCOMS Totals		**$2,323,573,650**	**79%**	**16%**	**5%**	**5.1%**	**2,674,629**	**$72**	**44.61%**

Air Force Totals

	Total Store $ Sales	Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
CONUS	1,854,438,685	79	16	5	3.2	2,070,600	75	46.83
Overseas	469,134,965	80	14	6	13.3	604,029	65	36.99
Worldwide	$2,323,573,650	79%	16%	5%	5.1%	2,674,629	$72	44.61%

Army Commissary Sales
(FY88)

Army Commissary Coupon Redemption
(FY88)

CONUS

Region	Number	% Share CONUS	% Share Worldwide	$ Value	% Share CONUS	%Share Worldwide
Midwest (MWCOR)	21,500,000	30.3	27.7	10,905,803	30.2	27.7
Northeast (NECOR)	17,100,000	24.1	22.1	8,655,073	4.1	22.0
Southeast (SECOR)	23,000,000	32.4	29.6	11,699,204	32.4	29.7
Western (WCOR)	9,400,000	13.2	12.1	4,784,890	13.3	12.1
CONUS Totals	**71,000,000**	**100.0%**	**91.5%**	**$36,044,970**	**100.0%**	**91.5%**

Overseas

Region	Number	% Share Overseas	% Share Worldwide	$ Value	% Share Overseas	%Share Worldwide
Europe (EURCOR)	6,600,000	100.0	8.5	3,336,767	100.0	8.5
Overseas Totals	**6,600,000**	**100.0%**	**8.5%**	**3,336,767**	**100.0%**	**8.5%**
Worldwide Totals	**77,600,000**		**100.0%**	**$39,381,737**		**100.0%**

Note: Data reported for Army commissaries do not reflect actual geographic distribution of coupon redemptions because official figures are reported by Region, with many stores in certain Regions actually operating overseas but reported in CONUS data, and vice-versa.

Midwest Region/TSA

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Ft. Ben Harrison, IN	6	18,557,066	81	14	5	9.0	14,145	109	0.47
Ft. Bliss, TX	8	52,334,367	81	15	4	–0.1	31,093	140	1.32
C. M. Price Support Ctr, IL	5	14,418,974	82	15	4	–1.9	20,912	58	0.36
Ft. Carson, CO	7	32,529,692	81	15	4	–3.5	21,864	124	0.82
Fitzsimons AMC, CO	4	9,578,208	82	14	4	–11.3	8,912	92	0.24
Ft. Hood, TX	8	56,922,659	81	16	4	–1.9	29,428	161	1.44
Ft. Hood Support Facility, TX	2	4,884,810	84	12	4	/a	5,061	80	0.12
Ft. Leavenworth, KS	6	22,299,638	83	12	4	5.5	17,043	109	0.56
Ft. Leonard Wood, MO	6	20,356,024	85	10	4	–0.7	14,910	114	0.51
Ft. Polk, LA	6	21,214,690	82	14	4	–2.7	19,642	90	0.54
Ft. Riley, KS	6	21,814,504	83	13	5	2.7	23,500	77	0.55
Rock Island Arsenal, IL	2	4,392,220	86	11	3	3.5	6,944	53	0.11
Ft. Sam Houston, TX	7	32,225,371	82	14	4	–10.4	23,368	115	0.81
Ft. Sam Houston Spt. Fac., TX	2	4,282,825	85	10	5	/	3,536	101	0.10
Selfridge ANG Base, MI	5	12,806,750	86	12	3	3.4	9,687	110	0.32
Ft. Sheridan, IL	3	8,405,730	86	11	3	6.5	8,418	83	0.21
Ft. Sill, OK	7	31,356,685	80	16	4	0.5	31,537	83	0.79
White Sands, NM	2	3,731,530	81	16	5	1.2	6,768	46	0.09
Region Totals		**$372,111,743**	**82%**	**14%**	**4%**	**1.5%**	**296,568**	**$105**	**9.41%**

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The A[illegible]Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY88 sales total as a percentage of separately combined CONUS (C[illegible]nental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

/a Total sales were formerly reported through its main facility.

Store classes for Army commissaries are based upon total average monthly sales, as follows:

Class 1	Up to $150,000
Class 2	$150,001–$500,000
Class 3	$500,001–$750,000
Class 4	$750,001–$1,000,000
Class 5	$1,000,001–$1,500,000
Class 6	$1,500,001–$2,100,000
Class 7	$2,100,001–$3,000,000
Class 8	Over $3,000,001

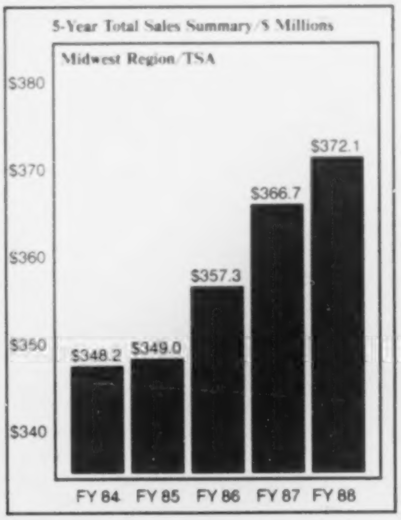
Army Commissary Sales

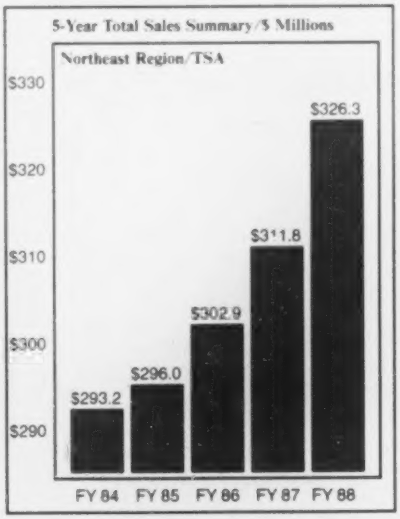
(FY88)

CONUS

Northeast Region/TSA

Store	Store Class	Total Store $ Sales	% of Store Total: Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Aberdeen PG, MD	4	11,558,473	84	12	4	1.8	14,229	68	0.29
ARDC (Picatinny), PA	2	2,854,616	83	13	4	4.6	6,400	37	0.07
Ft. Belvoir, VA	8	64,332,162	78	15	6	10.2	24,753	217	1.63
Cameron Station, VA	7	30,876,464	79	14	6	-3.0	31,616	81	0.78
Carlisle Barracks, PA	4	10,458,645	82	13	5	3.4	11,312	77	0.26
Ft. Devens, MA	5	16,723,499	82	13	5	2.1	12,770	109	0.42
Ft. Drum, NY	5	12,674,363	81	14	5	51.4	18,721	56	0.32
Edgewood Arsenal, MD	3	6,366,586	84	12	4	8.6	12,644	42	0.16
Ft. Hamilton, NY	4	9,406,102	85	11	4	3.9	11,400	69	0.24
Ft. McNair, DC	2	4,192,065	81	14	5	-27.6	17,800	20	0.11
Ft. Meade, MD	8	46,659,005	81	15	4	10.2	15,476	251	1.18
Ft. Monmouth, NJ	6	18,208,054	82	13	5	0.4	24,502	62	0.46
Ft. Myer, VA	6	21,119,575	79	15	6	1.5	26,000	68	0.53
New Cumberland, PA	3	6,385,458	85	11	3	1.4	13,390	40	0.16
Oakdale (C.E. Kelly), PA	3	7,145,989	85	13	2	4.0	6,000	99	0.18
Ft. Ritchie, MD	3	6,694,374	83	13	4	-0.4	5,500	101	0.17
Seneca AD, NY	2	2,577,822	82	14	3	-0.1	3,866	56	0.07
Stewart AB, NY	2	4,170,555	82	14	4	-2.3	5,900	59	0.11
Tobyhanna, PA	2	5,596,582	88	10	2	-1.3	9,000	52	0.14
Vint Hill Farms, VA	3	7,832,507	81	15	4	2.9	8,088	81	0.20
Walter Reed AMC, DC	6	21,781,406	79	16	5	-1.6	25,000	73	0.55
West Point, NY	3	8,702,495	78	15	7	2.4	5,290	137	0.22
Region Totals		**$326,316,797**	**81%**	**14%**	**5%**	**4.7%**	**309,657**	**$88**	**8.25%**





Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY88 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

Store classes for Army commissaries are based upon total average monthly sales, as follows:

Class 1	Up to $150,000
Class 2	$150,001-$500,000
Class 3	$500,001-$750,000
Class 4	$750,001-$1,000,000
Class 5	$1,000,001-$1,500,000
Class 6	$1,500,001-$2,100,000
Class 7	$2,100,001-$3,000,000
Class 8	Over $3,000,001

Army Commissary Sales
(FY88)

Southeast Region/TSA

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Ft. Benning, GA	8	41,266,656	81	15	4	3.7	32,723	105	1.04
Ft. Bragg, NC	8	45,212,391	80	16	4	5.1	38,260	98	1.14
Ft. Campbell, KY	8	39,818,887	81	15	4	3.3	25,436	130	1.01
Ft. Eustis, VA	5	17,777,514	80	15	5	−11.3	19,400	76	0.45
Ft. Gillem, GA	6	24,256,367	82	15	4	7.7	21,771	93	0.61
Ft. Gordon, GA	7	25,355,638	79	16	5	2.6	22,184	95	0.64
Hunter AAF, GA	5	12,259,816	81	15	4	2.8	17,400	59	0.31
Ft. Jackson, SC	7	29,216,869	81	14	5	6.3	27,000	90	0.74
Ft. Knox, KY	7	34,308,611	82	15	4	3.0	29,530	97	0.87
Ft. Lee, VA	6	21,058,720	80	15	5	5.5	25,200	70	0.53
Lexington Blue Grass, KY	2	3,532,585	89	8	3	25.5	7,196	41	0.09
Malonee Village, NC	4	9,159,618	79	15	6	/a	6,360	120	0.23
Ft. McClellan, AL	5	17,838,620	84	12	4	7.0	15,146	98	0.45
Ft. McPherson, GA	3	5,183,220	84	11	5	−2.3	8,100	53	0.13
Camp Merrill, GA	1	310,042	91	7	1	3.4	451	57	0.01
Ft. Monroe, VA	3	7,848,737	82	13	4	4.0	8,049	81	0.20
Pope AFB, NC	1	1,153,683	84	10	6	/a	9,587	10	0.03
Redstone Arsenal, AL	6	24,459,577	81	14	5	3.9	21,035	97	0.62
Richmond DGSC, VA	2	5,304,772	79	16	5	−4.6	12,586	35	0.13
Ft. Rucker, AL	6	22,835,181	81	15	4	10.0	22,260	85	0.58
Ft. Stewart, GA	5	16,910,898	79	16	4	−0.9	27,767	51	0.43
Ft. Story, GA	2	3,028,580	94	4	2	/a	4,269	59	0.08
Region Totals*		**$408,096,982**	**81%**	**15%**	**4%**	**4.5%**	**401,710**	**$85**	**10.31%**

Western Region/TSA

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Dugway Prov. Grnds., UT	1	1,564,077	83	11	6	−14.2	6,062	22	0.04
Ft. Huachuca, AZ	5	17,785,377	80	16	4	5.8	19,709	75	0.45
Ft. Irwin, CA	2	5,209,630	82	13	5	4.4	22,059	20	0.13
Ft. Lewis, WA	8	49,446,913	81	14	5	5.3	30,280	136	1.25
Oakland AB, CA	2	5,911,817	83	13	4	−4.3	3,072	160	0.15
Ft. Ord, CA	8	37,277,645	81	15	4	−0.1	18,190	171	0.94
Presidio of S.F., CA	5	17,058,863	79	15	6	−5.7	23,264	61	0.43
Sierra AD, CA	2	2,034,339	85	12	3	1.4	4,500	38	0.05
Yuma Prov. Grnds., AZ	2	2,066,374	84	9	7	−0.6	5,995	29	0.05
Region Totals**		**138,355,035**	**81**	**14**	**5**	**1.5**	**133,131**	**87**	**3.50**
CONUS TSA Totals		**$1,244,880,557**	**81%**	**14%**	**5%**	**3.3%**	**1,136,797**	**$91**	**31.46%**

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY88 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

*Excludes sales for Ft. Buchanan, PR, which are reported in overseas data.

**Excludes sales for Richardson, Greely and Wainwright, AK, and Schofield Barracks, HI, which are reported in overseas data.

/a Total sales were formerly reported through its main facility.

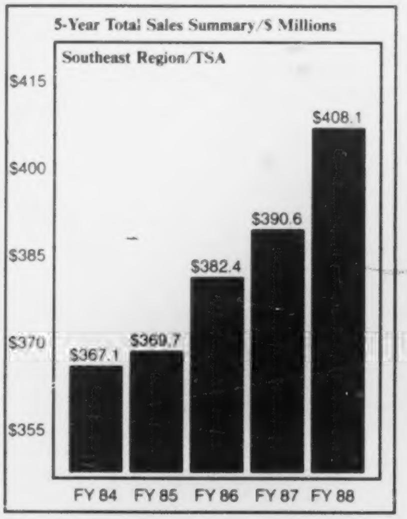
Store classes for Army commissaries are based upon total average monthly sales, as follows:

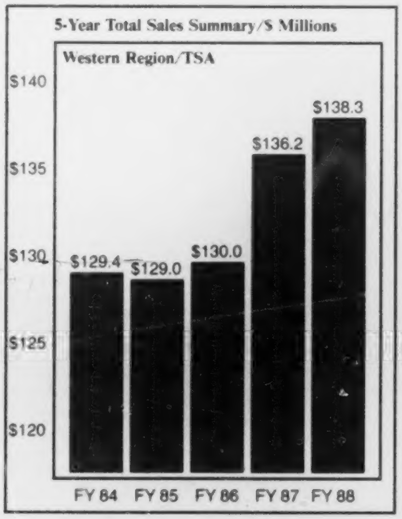
Class 1	Up to $150,000	Class 4	$750,001-$1,000,000	Class 7	$2,100,001-$3,000,000
Class 2	$150,001-$500,000	Class 5	$1,000,001-$1,500,000	Class 8	Over $3,000,001
Class 3	$500,001-$750,000	Class 6	$1,500,001-$2,100,000		

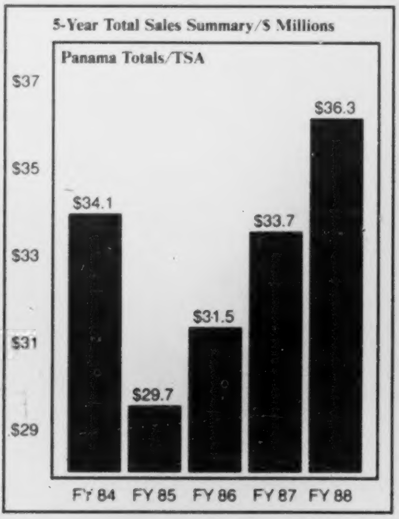
Army Commissary Sales
(FY88)

Midwest Region/Panama-TSA

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	% of Store Total Meat	% of Store Total Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Ft. Corozal	6	21,981,242	81	14	4	-1.1	11,564	158	1.76
Ft. Espinar	2	3,555,181	82	14	4	3.4	5,200	57	0.28
Howard AFB	3	7,242,125	82	14	4	2.7	5,400	112	0.58
Panama CDC	2	3,608,381	100	0	0	n/a	n/a	n/a	0.29
Panama Totals		**$ 36,386,929**	**83%**	**13%**	**4%**	**8.0%**	**22,164**	**$136**	**2.91%**


5-Year Total Sales Summary/$ Millions


5-Year Total Sales Summary/$ Millions


5-Year Total Sales Summary/$ Millions

Southeast Region/Puerto Rico-TSA

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	% of Store Total Meat	% of Store Total Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Ft. Buchanan	6	$24,382,216	94%	0%	6%	5.6%	18,084	$112	1.95%

n/a Totals not meaningful for comparison purposes.

Store classes for Army commissaries are based upon total average monthly sales, as follows:

Class 1	Up to $150,000
Class 2	$150,001–$500,000
Class 3	$500,001–$750,000
Class 4	$750,001–$1,000,000
Class 5	$1,000,001–$1,500,000
Class 6	$1,500,001–$2,100,000
Class 7	$2,100,001–$3,000,000
Class 8	Over $3,000,001

Army Commissary Sales
(FY88)

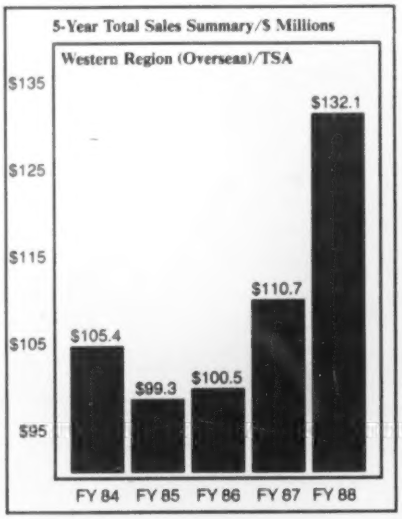
Western Region/Alaska, Hawaii, Japan & Korea-TSA

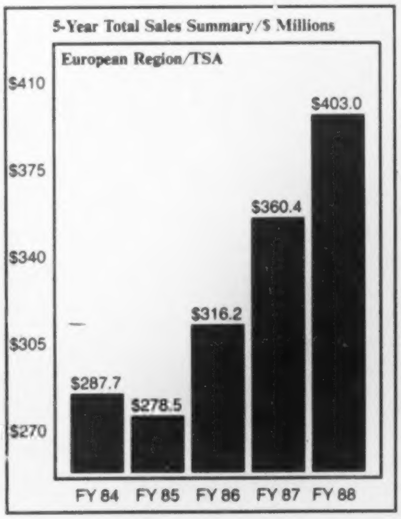
Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Camp Carroll, Korea	1	1,605,358	89	7	4	/a	3,560	38	0.13
Camp Casey, Korea	2	4,278,980	89	7	3	/a	3,060	117	0.34
Camp Edwards, Korea	1	1,078,958	90	8	2	/a	4,205	21	0.09
Camp Humphreys, Korea[1]	1	983,734	84	12	4	/a	3,065	27	0.08
Camp Kure, Japan[2]	1	41,203	99	1	0	/a	790	4	/b
Camp Page, Korea	1	489,841	87	10	3	/a	1,324	31	0.04
Camp Stanley, Korea	2	2,224,419	88	9	3	/a	1,369	135	0.18
Camp Zama, Japan	1	1,362,320	83	12	5	/a	3,852	29	0.11
Ft. Greely, AK	2	2,271,225	79	14	7	4.1	6,290	30	0.18
Hannam Village, Korea	1	1,595,204	91	5	4	/a	2,950	45	0.13
Pusan, Korea	2	2,997,441	85	7	8	32.7	5,734	44	0.24
Ft. Richardson, AK	5	13,124,374	80	14	6	0.6	15,713	70	1.05
Sagami, Japan	1	325,713	88	8	4	/a	2,016	13	0.03
Sagamihara, Japan[3]	3	7,256,792	82	10	8	-8.8	10,755	56	0.58
Schofield Barracks, HI	7	30,365,699	78	16	6	-7.9	25,059	101	2.43
Ft. Shafter, HI	2	4,995,392	86	9	6	/a	6,393	65	0.40
Taegu, Korea	3	7,306,425	85	8	7	7.3	4,875	125	0.59
Ft. Wainwright, AK	4	10,177,776	79	16	5	12.7	8,066	105	0.81
Yongsan, Korea	8	39,632,874	85	10	5	8.7	24,824	133	3.17
Western (Overseas) Totals		**$132,113,728**	**79%**	**11%**	**6%**	**19.3%**	**133,900**	**$86**	**11.08%**

[1] Camp Humphreys operating through the Yongsan commissary opened March 31, 1988.

[2] Camp Kure operating through the Sagamihara commissary opened December 23, 1987.

[3] Akizuki operating through the Sagamihara commissary closed December 23, 1987.





Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY88 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

/a Total sales were formerly reported through its main facility.
/b Less than 0.1%.
n/a Totals not meaningful for comparison purposes.
* Data not available.

Store classes for Army commissaries are based upon total average monthly sales, as follows:

Class 1 Up to $150,000
Class 2 $150,001-$500,000
Class 3 $500,001-$750,000
Class 4 $750,001-$1,000,000
Class 5 $1,000,001-$1,500,000
Class 6 $1,500,001-$2,100,000
Class 7 $2,100,001-$3,000,000
Class 8 Over $3,000,001

Army Commissary Sales

(FY88)

OVERSEAS

European Region/TSA

Store	Store Class	Total Store $ Sales	% of Store Total: Grocery	% of Store Total: Meat	% of Store Total: Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Amberg, FRG	1	1,345,989	84	11	5	-4.4	2,640	42	0.11
Ansbach, FRG	3	7,856,656	82	13	4	11.2	11,361	58	0.63
Aschaffenberg, FRG	2	5,924,713	82	13	5	7.9	10,721	46	0.47
Augsburg, FRG	4	11,444,475	82	13	4	8.7	9,245	103	0.92
Babenhausen, FRG	2	1,909,262	85	11	4	/a	2,878	55	0.15
Bad Aibling, FRG	1	1,402,905	82	12	6	13.3	4,250	28	0.11
Bad Hersfeld, FRG	1	1,403,708	85	11	4	16.0	3,390	35	0.11
Bad Kissingen, FRG	1	1,757,863	84	11	5	10.1	2,347	62	0.14
Bad Kreuznach, FRG	2	5,140,075	81	14	6	-8.1	7,060	61	0.41
Bad Nauheim, FRG	2	3,774,780	83	12	5	13.3	6,176	51	0.30
Bad Toelz, FRG	1	1,505,431	79	14	7	8.8	4,572	27	0.12
Bamberg, FRG	3	8,030,790	82	14	4	1.3	9,056	74	0.64
Baumholder, FRG	4	9,993,466	81	14	5	-4.5	9,941	84	0.80
Berchtesgaden, FRG	1	1,197,674	85	13	2	-1.6	2,875	35	0.10
Berlin, FRG	5	13,907,889	79	14	7	9.5	17,100	68	1.11
Bindlach, FRG	1	1,561,285	84	12	4	6.8	2,244	58	0.13
Bremerhaven, FRG	3	8,718,186	93	15	2	-24.4	10,458	62	0.62
Buedingen, FRG	1	1,303,520	88	8	4	/a	3,200	34	0.10
Bueren, FRG	1	484,763	85	13	3	/a	1,260	32	0.04
Cairo, Egypt	2	1,843,726	94	0	6	-2.8	3,253	47	0.15
Camp King, FRG	1	589,634	85	9	6	/a	840	58	0.05
Chievres, Belgium	3	8,637,533	80	15	5	14.0	10,581	68	0.69
Crailsheim, FRG	1	1,171,604	82	13	5	12.4	2,390	41	0.09
Darmstadt, FRG	3	6,558,410	80	16	4	-8.9	9,006	61	0.53
Dexheim, FRG	1	997,213	87	10	4	/a	2,350	35	0.08
Dhahran, Saudi Arabia	1	980,939	95	0	5	17.9	4,544	18	0.08
Erlangen, FRG	2	2,413,007	84	11	5	-3.4	2,954	68	0.19
Fischbach, FRG	1	232,982	91	7	2	/a	1,880	10	0.02
Flensburg, FRG	1	414,686	85	12	3	/a	680	51	0.03
Fliegerhorst, FRG	1	991,379	89	7	4	/a	1,780	46	0.08
Frankfurt, FRG	6	19,530,067	78	15	7	2.1	17,928	91	1.56
Fuerth, FRG	6	19,107,344	80	15	4	6.4	21,870	73	1.53
Fulda, FRG	2	5,213,160	81	14	5	8.6	6,719	65	0.42

continued on page 100

BELIEVE IT OR NOT

Do you know how many overseas military commissaries were in operation in FY88? The answer: 195.

/a Total sales were formerly reported through its main facility

/b Less than 0.1%

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY88 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

Army Commissary Sales

(FY88)

OVERSEAS

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Garmisch, FRG	1	1,411,670	81	11	8	10.9	3,315	35	0.11
Gelnhausen, FRG	2	3,117,675	84	11	4	-28.0	5,871	44	0.25
Giebelstadt, FRG	1	935,436	87	10	4	/a	1,524	51	0.07
Goeppingen, FRG	2	2,654,461	83	11	5	7.4	4,597	48	0.21
Grafenwoehr, FRG	2	4,881,329	80	14	6	-21.8	5,952	68	0.39
Hanau, FRG	6	18,481,206	79	15	6	9.6	16,813	92	1.48
Heidelberg, FRG	5	17,310,831	79	15	6	9.9	18,500	78	1.39
Heilbronn, FRG	2	5,446,193	81	14	5	4.7	8,176	56	0.44
Helmstedt, FRG	1	170,449	86	11	2	/a	2,130	7	0.01
Herzo Base, FRG	1	989,779	90	7	3	/a	2,350	35	0.08
Illesheim, FRG	2	2,743,132	83	13	4	28.5	4,701	49	0.22
Karlsruhe, FRG	3	7,285,270	81	14	5	2.8	12,057	50	0.58
Giessen, FRG	5	12,058,218	81	15	4	-9.5	15,015	67	0.97
Germersheim, FRG	1	499,084	84	13	4	/a	2,787	15	0.04
Hohenfels, FRG	1	1,367,048	83	12	5	-6.6	2,621	43	0.11
Idar Oberstein, FRG	1	667,130	83	12	4	/a	2,175	26	0.05
Kelly Barracks, FRG	2	4,035,262	78	15	7	-4.6	9,240	36	0.32
Kirchgoens, FRG	1	1,192,946	89	8	3	/a	2,487	40	0.10
Kitzingen, FRG	3	6,963,682	79	16	5	14.0	9,311	62	0.56
Livorno, Italy	2	3,836,575	81	14	5	14.0	5,816	55	0.31
Ludwigsburg, FRG[1]	2	2,298,271	81	14	5	-23.1	n/a	n/a	0.18
Mainz, FRG	2	5,670,247	79	16	5	-5.5	1,550	305	0.45
Mainz Kastel (CDC)	1	248,708 100	0	0	n/a	n/a	n/a	n/a	0.02
Mannheim, FRG	5	14,375,495	79	16	5	6.5	8,700	138	1.15
McCully Barracks, FRG	1	388,310	94	3	2	/a	1,440	22	0.03
Muenster, FRG	1	591,825	86	12	3	/a	2,200	22	0.05
Munich, FRG	3	6,860,456	77	16	7	17.3	10,140	56	0.55
Neckarsulm, FRG	1	241,089	93	5	2	/a	962	21	0.02
Neu Ulm, FRG	2	4,795,322	79	16	5	3.0	5,431	74	0.38
Neubruecke, FRG	1	708,696	84	11	5	/a	2,435	24	0.06
Osterholz-Scharmbeck, FRG	2	4,097,825	84	12	5	/a	2,350	145	0.33
Panzer, FRG[2]	1	31,375	98	1	1	/a	3,840	1	/b
Patch Barracks, FRG	3	7,979,633	78	17	6	18.4	13,936	48	0.64
Pirmasens, FRG	2	5,573,780	82	14	4	5.8	5,317	87	0.45
Regensburg, FRG	1	140,979	86	13	2	/a	770	15	0.01
Rheinberg, FRG	1	1,464,856	83	12	5	/a	6,356	19	0.12
Riyadh, Saudi Arabia	2	2,578,914	95	0	5	-0.5	4,507	48	0.21
Robinson Barracks, FRG	4	11,382,628	79	16	5	16.7	16,073	59	0.91
Schinnen, NL	2	5,696,292	79	16	5	-1.0	10,893	44	0.46
Schwaebisch Gmuend, FRG	2	2,636,547	84	11	5	6.9	4,222	52	0.21
Schwaebisch Hall, FRG	1	1,321,308	82	12	6	1.8	3,816	29	0.11
Schwabach, FRG	1	1,149,654	87	9	3	/a	3,128	31	0.09
Schweinfurt, FRG	4	9,912,598	81	14	5	9.9	17,833	46	0.79
Soegel, FRG	1	419,826	87	10	3	/a	3,534	10	0.03
Spinelli Barracks (CDC)	2	5,168,030	100	0	0	n/a	n/a	n/a	0.41

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[1] Closed June 30, 1988.

[2] Panzer Kaserne operating through Patch Barracks commissary opened September 1, 1988.

/a Total sales were formerly reported through its main facility.

/b Less than 0.1%.

n/a Totals not meaningful for comparison purposes.

Army Commissary Sales
(FY88)

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Vicenza, Italy	3	7,193,052	80	15	6	8.4	3,732	161	0.58
Vilseck, FRG	2	2,251,800	85	11	4	/a	2,290	82	0.18
Wertheim, FRG	1	1,776,775	81	14	5	9.1	4,176	35	0.14
Wiesbaden, FRG	6	19,911,368	79	15	6	9.8	12,506	133	1.59
Wildflecken, FRG	2	3,152,872	82	13	5	–4.8	4,512	58	0.25
Wildflecken #2, FRG	1	578,472	92	5	3	/a	1,029	47	0.05
Worms, FRG	2	3,465,728	80	14	5	6.6	6,895	42	0.28
Wuerzburg, FRG	4	9,163,070	82	13	5	3.4	8,100	94	0.73
Zweibruecken, FRG	3	6,454,150	80	15	5	7.2	9,235	58	0.52
Region Totals		**$403,072,441**	**81%**	**14%**	**5%**	**11.6%**	**$524,895**	**64**	**32.19%**
Overseas TSA Totals		**$595,955,314**	**82%**	**13%**	**5%**	**12.7%**	**$699,043**	**71**	**47.67%**
Worldwide TSA Totals		**$1,840,835,871**	**81%**	**14%**	**5%**	**6.1%**	**$1,835,840**	**$83**	**35.35%**

Army Totals

	Total Store $ Sales	Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
CONUS	1,244,880,557	81	14	5	3.3	1,136,797	91	31.46
Overseas	595,955,314	82	13	5	12.7	699,043	71	47.67
Worldwide	$1,840,835,871	81%	14%	5%	6.1%	1,835,840	$83	35.35%

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Marine Corps Commissary Sales
(FY88)

CONUS

Marine Corps Commissary Coupon Redemptions
(FY88)

CONUS

Store	Number	% Share CONUS	% Share Worldwide	$ Value	% Share CONUS	%Share Worldwide
Albany, GA	265,960	4.0	3.8	91,174	4.3	4.1
Barstow, CA	131,236	2.0	1.9	44,226	2.1	2.0
Camp Pendleton, CA	985,085	14.8	14.2	332,092	15.8	15.0
Cherry Point NC	1,014,463	15.3	14.6	235,462	11.2	10.6
El Toro, CA	1,117,393	16.8	16.0	377,330	18.0	17.2
Hadnot Point, NC	555,972	8.4	8.0	173,760	8.3	7.8
New River, NC	106,953	1.6	1.6	34,800	1.7	1.7
Parris Island, SC	298,286	4.5	4.3	96,574	4.6	4.4
Quantico, VA	951,078	14.3	13.6	312,224	14.9	14.1
San Onofre, CA	179,205	2.8	2.5	62,464	2.9	2.9
Tarawa Terrace, NC	588,378	8.9	8.6	189,191	9.0	8.5
Twentynine Palms, CA	269,050	4.1	3.8	87,471	4.3	3.9
Yuma, AZ	164,976	2.5	2.4	60,721	2.9	2.7
CONUS Totals	**6,628,035**	**100.0%**	**95.3%**	**$2,097,489**	**100.0%**	**94.9%**

Overseas

Store	Number	% Share Overseas	% Share Worldwide	$ Value	% Share Overseas	%Share Worldwide
Iwakuni, Japan	27,607	8.4	0.4	8,840	7.8	0.4
Kaneohe Bay, HI	300,884	91.6	4.3	103,906	92.2	4.7
Overseas Totals	**328,491**	**100.0%**	**4.7**	**$ 112,746**	**100.0%**	**5.1**
Worldwide Totals	**6,956,526**	**–**	**100.0%**	**$2,210,235**	**–**	**100.0%**

East Coast Complex/USMC

Store	Store Class	Total Store $ Sales	% of Store Total: Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Albany, GA	3	5,751,201	74	20	6	0.1	13,980	34	0.15
Hadnot Point, NC	6	13,063,108	80	16	4	–0.1	16,627	66	0.33
Tarawa Terrace, NC	6	15,610,656	79	16	5	6.5	23,680	55	0.39
Cherry Point, NC	6	17,299,645	79	16	5	-0.1	18,655	77	0.44
New River, NC	2	3,659,248	81	14	5	7.8	6,344	48	0.09
Parris Island, SC	4	7,625,778	78	16	6	–4.6	11,500	55	0.19
Quantico, VA	7	21,890,588	78	17	5	4.2	19,500	94	0.55
Complex Totals		**$ 84,900,224**	**79%**	**16%**	**5%**	**2.0%**	**110,286**	**$64**	**2.15%**

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY88 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

/a Less than 0.1%
n/a Totals not meaningful for comparison purposes.

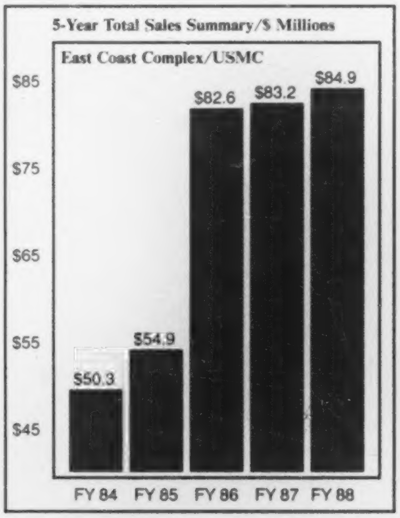
Store classes for Marine Corps commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $100,000
Class 2 $100,001–$300,000
Class 3 $300,001–$500,000
Class 4 $500,001–$750,000
Class 5 $750,001–$1,000,000
Class 6 $1,000,001–$1,500,000
Class 7 $1,500,001–$2,000,000
Class 8 Over $2,000,000

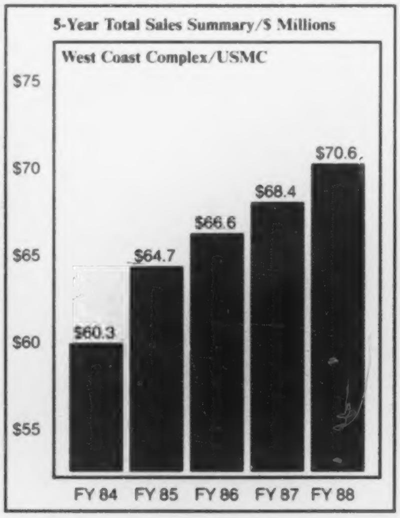
West Coast Complex/USMC

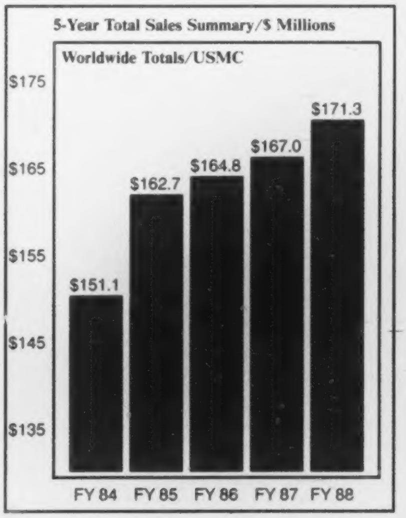
Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Barstow, CA	2	3,694,954	77	16	7	6.9	9,000	34	0.09
Camp Pendleton, CA	7	24,931,166	75	18	7	8.3	26,000	80	0.63
San Onofre, CA	3	4,509,217	78	14	8	2.9	8,700	43	0.11
El Toro, CA	7	22,636,267	77	16	7	-2.5	25,000	75	0.57
Twentynine Palms, CA	4	8,082,813	75	19	6	3.0	15,500	44	0.20
Yuma, AZ	4	6,813,897	80	15	5	4.6	10,400	55	0.17
Complex Totals		**$ 70,668,314**	**77%**	**16%**	**7%**	**3.3%**	**94,600**	**$62**	**1.79%**
CONUS USMC Totals		**$155,568,538**	**79%**	**16%**	**5%**	**2.6%**	**204,886**	**$63**	**3.93%**

Overseas/USMC

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Iwakuni, Japan	2	3,618,947	79	16	5	9.8	9,000	34	0.29
Kaneohe Bay, HI	6	12,164,196	78	15	7	0.6	13,300	76	0.97
Overseas USMC		**$ 15,783,143**	**78%**	**15%**	**7%**	**2.6%**	**22,300**	**$59**	**1.26%**
Worldwide USMC Totals		**$171,351,681**	**78%**	**16%**	**6%**	**2.6%**	**227,186**	**$63**	**3.30%**


5-Year Total Sales Summary/$ Millions


5-Year Total Sales Summary/$ Millions


5-Year Total Sales Summary/$ Millions

Marine Corps Totals

	Total Store $ Sales	Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
CONUS	155,568,538	79	16	5	2.6	204,886	63	3.93
Overseas	15,783,143	78	15	7	2.6	22,300	59	1.26
Worldwide	$171,351,681	78%	16%	6%	2.6%	227,186	$63	3.29%

Navy Commissary Sales

(FY88)

CONUS

Navy Commissary Coupon Redemptions

(FY88)

	Number	% Share Worldwide	$ Value	%Share Worldwide
CONUS	38,358,198	98.3	13,338,547	98.2
Overseas	676,770	1.7	244,067	1.8
Worldwide Totals	**39,034,968**	**100.0%**	**$13,582,614**	**100.0%**

Auburn Division/Navy

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Bangor, WA	5	14,364,388	77	16	7	7.8	22,000	54	0.36
Bremerton, WA	5	8,860,250	75	17	8	6.0	12,352	60	0.22
Seattle, WA	6	15,974,270	75	17	8	-0.5	13,500	99	0.40
Whidbey Island, WA	6	14,277,805	76	16	8	8.0	12,354	96	0.36
Division Totals		**$ 53,476,713**	**76%**	**16%**	**8%**	**5.0%**	**60,206**	**$74**	**1.35%**

Davisville Division/Navy

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Brunswick, ME	3	9,035,368	77	16	7	6.1	11,662	65	0.23
Cutler, ME	1	605,074	78	18	4	3.5	2,252	22	0.02
Governor's Island, NY	2	3,199,164	79	13	8	155.5	6,700	16	0.01
Mitchel Field, NY	7	7,284,028	72	21	7	0.5	12,290	49	0.18
New London, CT	6	21,530,787	77	16	7	-1.8	21,685	83	0.54
Newport, RI	5	12,918,895	74	18	8	4.1	14,346	75	0.33
Scotia, NY	2	3,701,221	77	18	5	9.9	8,200	38	0.09
Winter Harbor, ME	1	579,513	79	16	5	-2.2	1,876	26	0.01
Division Totals		**$ 58,854,050**	**77%**	**17%**	**6%**	**5.3%**	**79,011**	**$62**	**1.42%**

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY88 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

/a Less than 0.1%.
n/a Totals not meaningful for comparison purposes.
* Data not available.

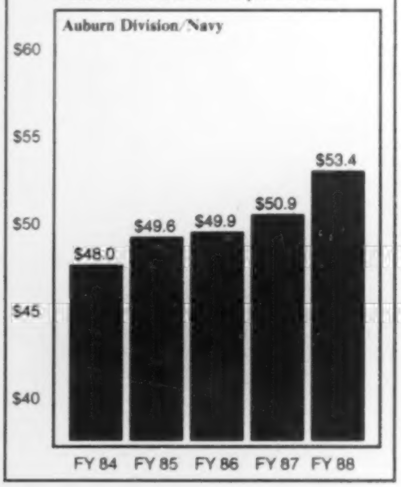
Store classes for Navy commissaries are based upon total average monthly sales, as follows:

Class 1	Up to $150,000
Class 2	$150,001-$500,000
Class 3	$500,001-$750,000
Class 4	$750,001-$1,000,000
Class 5	$1,000,001-$1,500,000
Class 6	$1,500,001-$2,100,000
Class 7	$2,100,001-$3,000,000
Class 8	Over $3,000,000

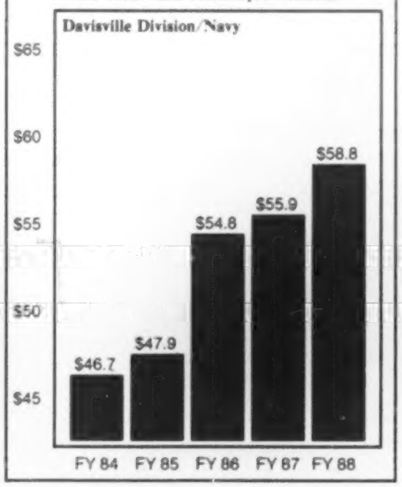
Jacksonville Group/Navy

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	% of Store Total Meat	% of Store Total Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Athens, GA	2	2,510,133	74	18	8	2.7	4,400	48	0.06
Cecil Field, FL	3	6,252,129	73	21	6	-6.3	10,226	51	0.16
Charleston NS, SC	4	9,009,878	82	12	6	-7.8	25,727	29	0.23
Charleston NWS, SC	4	11,138,605	80	13	7	5.4	10,540	88	0.28
Jacksonville, FL	7	29,134,303	75	17	8	-3.1	19,728	123	0.74
Key West, FL	2	4,860,941	75	17	8	3.6	9,139	44	0.12
Kings Bay, GA	2	4,165,754	77	17	6	17.0	17,000	20	0.11
Mayport, FL	5	11,767,029	75	18	7	-4.1	11,700	84	0.30
Orlando, FL	6	21,153,243	74	19	7	2.2	30,155	58	0.53
Group Totals		**$ 99,992,015**	**76%**	**17%**	**7%**	**-0.8%**	**138,615**	**$60**	**2.53%**

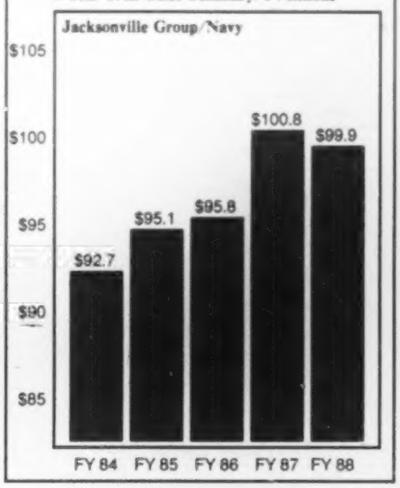
5-Year Total Sales Summary/$ Millions



5-Year Total Sales Summary/$ Millions



5-Year Total Sales Summary/$ Millions



BELIEVE IT OR NOT

How many CONUS military commissaries were in operation in FY88? The answer: 236.

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY88 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

/a Less than 0.1%
n/a Totals not meaningful for comparison purposes
* Data not available

Store classes for Navy commissaries are based upon total average monthly sales, as follows:

Class	Sales	Class	Sales	Class	Sales
Class 1	Up to $150,000	Class 4	$750,001-$1,000,000	Class 7	$2,100,001-$3,000,000
Class 2	$150,001-$500,000	Class 5	$1,000,001-$1,500,000	Class 8	Over $3,000,000
Class 3	$500,001-$750,000	Class 6	$1,500,001-$2,100,000		

Navy Commissary Sales

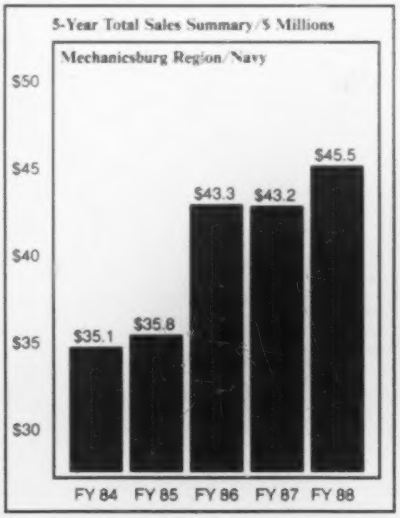
(FY88)

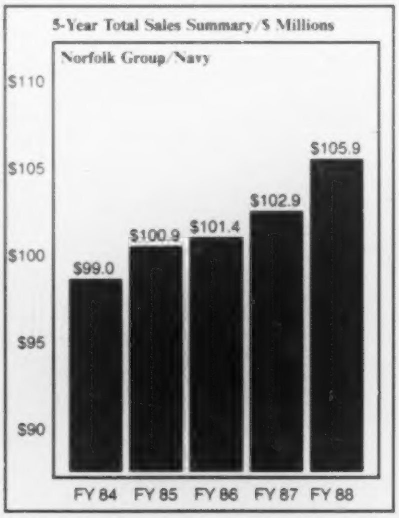
Mechanicsburg Region/Navy

Store	Store Class	Total Store $ Sales	% of Store Total: Grocery	% of Store Total: Meat	% of Store Total: Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Crane, IN	1	555,573	78	19	3	3.3	2,650	17	0.01
Great Lakes, IN	5	15,508,836	76	17	7	5.0	18,700	69	0.39
Annapolis, MD	3	8,166,918	74	20	6	8.8	13,374	51	0.21
Dahlgren, VA	1	1,125,910	76	19	5	–4.6	4,593	20	0.03
Lakehurst, NJ	2	2,881,214	72	20	8	2.7	5,075	47	0.07
Patuxent River, MD	4	7,977,684	77	17	6	10.2	9,406	71	0.20
Philadelphia, PA	4	9,306,551	74	19	7	2.0	17,502	44	0.24
Region Totals		**$ 45,522,686**	**75%**	**19%**	**6%**	**5.5%**	**71,300**	**$53**	**1.15%**

Norfolk Group/Navy

Store	Store Class	Total Store $ Sales	% of Store Total: Grocery	% of Store Total: Meat	% of Store Total: Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Little Creek, VA	8	39,906,277	75	18	7	0.1	35,912	93	1.01
Norfolk, VA	5	20,436,457	77	17	6	13.0	25,711	66	0.52
Oceana, VA	7	28,740,237	77	17	6	–0.1	23,839	100	0.73
Portsmouth, VA	5	13,755,239	76	19	5	2.6	21,346	54	0.35
Yorktown, VA	2	3,100,481	74	20	6	–1.1	7,056	37	0.08
Group Totals		**$105,938,691**	**76%**	**18%**	**6%**	**2.8%**	**113,864**	**$78**	**2.68%**





/a Less than 0.1%
n/a Totals not meaningful for comparison purposes.
* Data not available

Store classes for Navy commissaries are based upon total average monthly sales, as follows:
Class 1 Up to $150,000
Class 2 $150,001–$500,000
Class 3 $500,001–$750,000
Class 4 $750,001–$1,000,000
Class 5 $1,000,001–$1,500,000
Class 6 $1,500,001–$2,100,000
Class 7 $2,100,001–$3,000,000
Class 8 Over $3,000,000

Notes: All sales data are preliminary and unaudited, and exclude the 5% commissary surcharge. The ACV (All Commodity Volume) in the extreme right column shows each individual commissary's or management area's FY88 sales total as a percentage of separately combined CONUS (Continental U.S.) and overseas sales of all Air Force, Army, Marine Corps and Navy commissaries. Sales at stores in Alaska, Hawaii, and other locations not contiguous with the 48 continental United States are classed and reported with overseas data. Details may not add to 100 percent due to rounding.

Navy Commissary Sales
(FY88)

Oakland Division/Navy

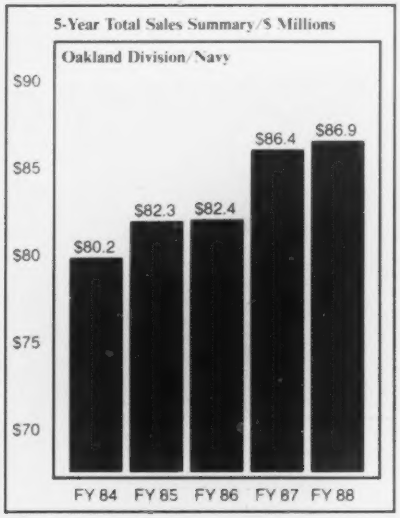
Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Alameda, CA	6	22,058,707	74	20	6	4.3	22,835	81	0.56
Fallon, NV	2	2,392,329	83	14	3	7.0	4,000	50	0.06
Lemoore, CA	3	8,870,450	82	14	4	3.5	16,870	44	0.22
Mare Island, CA	4	11,130,706	76	17	7	–3.4	16,840	55	0.28
Moffett Field, CA	7	25,872,429	74	19	7	–2.0	18,280	118	0.65
Hamilton, CA	4	9,912,555	77	16	7	1.8	19,500	42	0.25
Stockton, CA	2	3,436,637	78	17	5	0.9	7,422	39	0.09
Treasure Island, CA	2	3,247,384	77	17	6	–3.6	9,696	28	0.08
Division Totals		**$ 86,921,197**	**78%**	**16%**	**6%**	**0.6%**	**115,443**	**$63**	**2.20%**

Pensacola Region/Navy

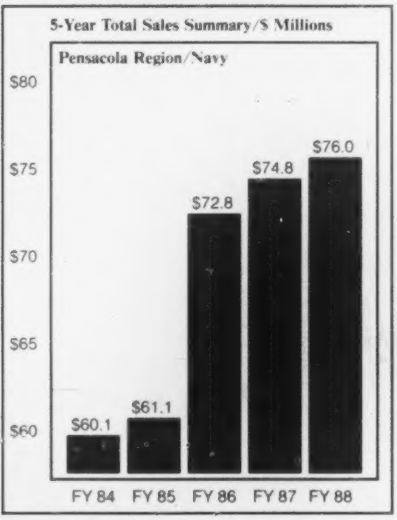
Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Beeville, TX	2	2,002,451	78	15	7	-5.1	5,464	31	0.05
Corpus Christi, TX	3	6,831,270	77	18	7	4.5	14,024	41	0.17
Kingsville, TX	2	1,854,897	76	18	6	–5.3	6,700	23	0.05
Gulfport, MS	3	5,359,743	76	18	6	6.1	10,076	44	0.14
Memphis, TN	6	18,109,890	77	18	7	1.5	22,468	67	0.46
Meridian, MS	3	3,964,372	77	19	4	–3.4	8,844	37	0.10
New Orleans, LA	5	9,155,847	77	16	6	–5.5	9,600	79	0.23
Pensacola, FL	7	24,854,398	75	18	7	4.8	23,044	90	0.63
Whiting Field, FL	3	3,873,309	74	20	6	2.7	7,645	42	0.10
Region Totals		**$ 70,006,177**	**76%**	**18%**	**6%**	**1.6%**	**107,865**	**$59**	**1.92%**

San Diego Group/Navy

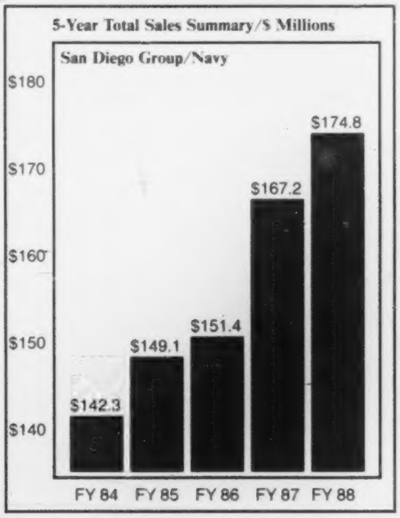
Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
China Lake, CA	2	2,790,919	77	16	7	–4.1	3,927	59	0.07
El Centro, CA	1	902,622	74	19	7	–5.4	3,760	20	0.02
Imperial Beach, CA	7	31,828,734	75	18	7	13.2	38,600	69	0.80
Long Beach, CA	6	24,011,726	75	18	7	1.6	26,800	75	0.61
Miramar, CA	8	49,096,292	75	17	8	4.0	38,600	106	1.24
North Island, CA	3	7,055,818	77	15	8	0.5	14,415	41	0.18
Port Hueneme, CA	6	13,780,664	75	18	7	3.5	16,700	69	0.35
Point Mugu, CA	2	3,265,584	78	16	6	–4.5	7,520	36	0.08
San Diego NS, CA	7	33,113,143	75	18	7	3.0	32,590	85	0.84
San Diego NTC, CA	3	9,012,597	77	15	8	7.0	13,238	57	0.23
Group Totals		**174,858,099**	**76**	**17**	**7**	**4.6**	**196,150**	**74**	**4.42**
CONUS Navy Totals		**$701,569,628**	**76%**	**17%**	**7%**	**7.6%**	**882,454**	**$66**	**17.7%**


5-Year Total Sales Summary/$ Millions

Oakland Division/Navy


5-Year Total Sales Summary/$ Millions

Pensacola Region/Navy


5-Year Total Sales Summary/$ Millions

San Diego Group/Navy

AFTER 45 YEARS, STILL THE BEST-DRESSED CHICKEN AROUND

ONE OF THE WORLD'S FINEST LINES OF CHICKEN PRODUCTS—

Rockingham Poultry's world-wide reputation has been earned through the years by a single-minded devotion to the highest quality standards.

The most up-to-date plants process and package the finest poultry selected from flocks grown from egg to maturity under strict Rockingham supervision.

Millions of satisfied customers praise the quality and value of Rockingham poultry products. Judge this quality and value for yourself. Compare, and we're certain you'll decide to order Rockingham Poultry.

You and your customers will be glad you did.

Rockingham

ROCKINGHAM POULTRY, INC., A Subsidiary of WLR Foods, Inc.

SB # 10-600-6

Represented by C. Lloyd Johnson Co., Inc.

Navy Commissary Sales
(FY88)

Naples Region/Navy

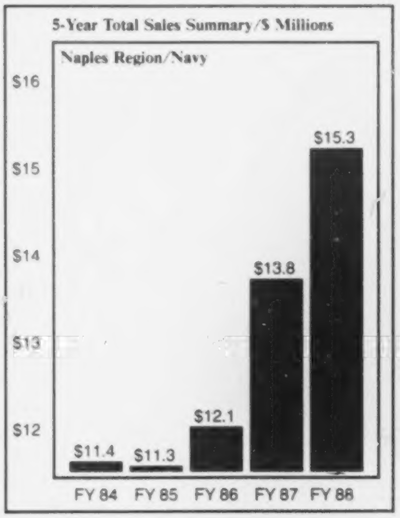
Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
La Maddalena	1	1,073,685	87	13	0	-6.4	1,500	60	0.09
Naples	3	9,106,664	80	14	6	12.3	6,804	112	0.73
Sigonella	2	5,137,006	81	13	6	13.0	9,025	47	0.41
Region Totals		**$15,317,355**	**83%**	**13%**	**4%**	**11.0%**	**17,329**	**$74**	**1.23%**

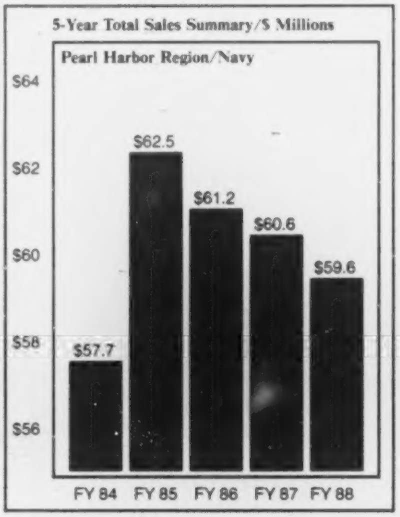
Pearl Harbor Region/Navy

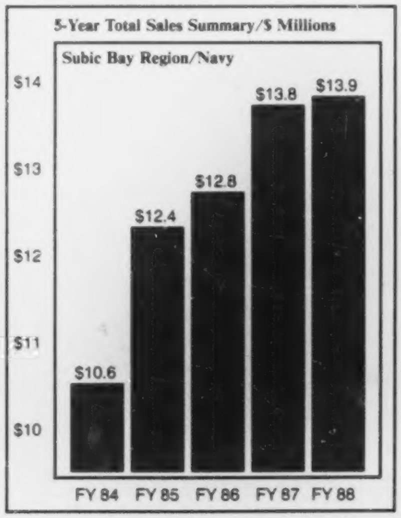
Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
Barbers Point, HI	3	9,097,630	74	17	9	2.5	9,660	78	0.73
Pearl Harbor, HI	8	50,530,578	76	17	7	-2.3	24,641	171	4.05
Region Totals		**$59,628,208**	**75%**	**17%**	**8%**	**-1.6%**	**34,301**	**$145**	**4.77%**

Subic Bay Region/Navy

Store	Store Class	Total Store $ Sales	% of Store Total			Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
			Grocery	Meat	Produce				
San Miguel, PI	2	1,287,590	79	14	7	2.1	2,514	43	0.10
Subic Bay, PI	5	12,685,733	80	12	8	1.0	11,000	96	1.02
Region Totals		**$13,973,323**	**79%**	**13%**	**8%**	**1.1%**	**13,514**	**$86**	**1.12%**







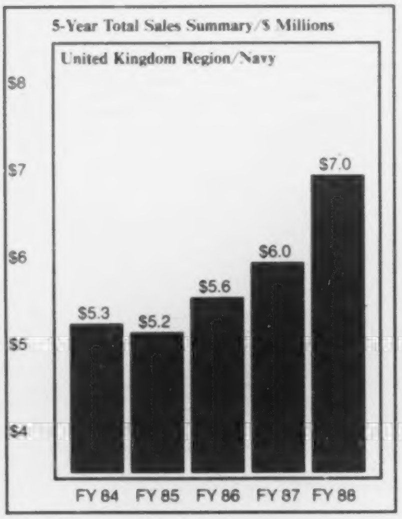
Navy Commissary Sales
(FY88)

United Kingdom Region/Navy

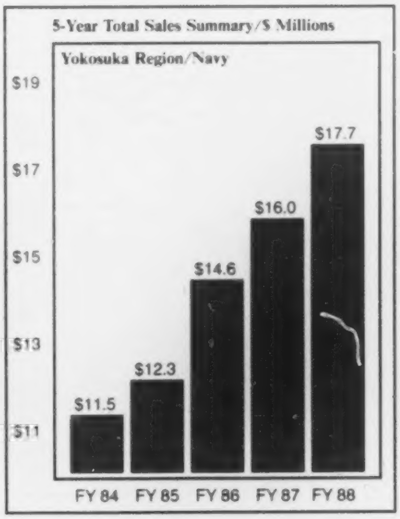
Store	Store Class	Total Store $ Sales	% of Store Total Grocery	% of Store Total Meat	% of Store Total Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Edzell, Scotland	1	1,401,468	78	15	7	12.6	3,474	34	0.11
Holy Loch, Scotland	2	5,687,260	83	12	5	20.3	4,841	98	0.46
Totals		**$7,088,728**	**81%**	**14%**	**6%**	**18.7%**	**8,315**	**$71**	**0.57%**

Yokosuka Region/Navy

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	% of Store Total Meat	% of Store Total Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Atsugi, Japan	2	3,649,609	82	12	6	10.2	6,326	48	0.29
Chinhae, Korea	1	562,744	85	10	5	21.8	2,400	20	0.05
Sasebo, Japan	1	1,726,668	81	14	5	18.3	3,208	45	0.14
Yokosuka, Japan	4	11,818,666	76	16	8	5.3	14,600	67	0.95
Regional Totals		**$17,757,687**	**81%**	**13%**	**6%**	**7.9%**	**26,534**	**$56**	**1.42%**


5-Year Total Sales Summary/$ Millions

United Kingdom Region/Navy


5-Year Total Sales Summary/$ Millions

Yokosuka Region/Navy

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/a Less than 0.1%
n/a Totals not meaningful for comparison purposes.
* Data not available.

Store classes for Navy commissaries are based upon total average monthly sales, as follows:

Class	Sales
Class 1	Up to $150,000
Class 2	$150,001-$500,000
Class 3	$500,001-$750,000
Class 4	$750,001-$1,000,000
Class 5	$1,000,001-$1,500,000
Class 6	$1,500,001-$2,100,000
Class 7	$2,100,001-$3,000,000
Class 8	Over $3,000,000

Navy Commissary Sales
(FY88)

OVERSEAS

Stand-Alone Stores/Navy *

Store	Store Class	Total Store $ Sales	% of Store Total Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
Adak, AK	3	4,319,835	76	15	9	7.0	8,480	42	0.35
Argentia, Newfoundland	1	763,695	81	13	6	9.9	6,726	9	0.06
Bermuda	2	4,222,262	78	15	7	0.9	5,607	63	0.34
Exmouth, Australia	1	660,260	76	17	7	21.6	3,077	18	0.05
Guam	5	17,263,913	77	17	6	0.6	15,303	94	1.38
Guantanamo Bay, Cuba	3	6,446,130	75	16	9	7.6	8,100	66	0.52
Keflavik, Iceland	2	4,593,709	78	15	7	11.3	7,784	49	0.37
Roosevelt Roads, PR	3	8,566,245	77	17	6	7.2	9,440	76	0.69
Rota, Spain	3	7,471,425	84	13	3	12.4	8,716	71	0.60
Stand-Alone Stores' Total		**$54,307,474**	**n/a**	**n/a**	**n/a**	**5.7**	**73,233**	**$62**	**4.35%**
Overseas Navy Totals		**$168,072,775**	**77%**	**15%**	**8%**	**3.7%**	**173,226**	**$81**	**13.46%**
Worldwide Navy Totals		**$869,642,403**	**76%**	**17%**	**7%**	**3.0%**	**1,055,680**	**$69**	**16.70%**

Navy Totals

	Total Store $ Sales	Grocery	Meat	Produce	Total Sales % Change vs. FY87	Total Sq. Ft. Sales Area	Avg. Mo. $ Sales/ Sq. Ft.	ACV
CONUS	701,569,628	76	17	7	7.6	882,454	66	17.73
Overseas	168,072,775	77	15	8	3.7	173,226	81	13.46
Worldwide	$869,642,403	76%	17%	7%	3.0%	1,055,680	$69	16.70%

BELIEVE IT OR NOT

How many CONUS military commissaries were in operation in FY88? The answer: 236.

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/a Less than 0.1%
n/a Totals not meaningful for comparison purposes.
* Data not available.

Store classes for Navy commissaries are based upon total average monthly sales, as follows

Class 1	Up to $150,000
Class 2	$150,001-$500,000
Class 3	$500,001-$750,000
Class 4	$750,001-$1,000,000
Class 5	$1,000,001-$1,500,000
Class 6	$1,500,001-$2,100,000
Class 7	$2,100,001-$3,000,000
Class 8	Over $3,000,000

All-Service Commissary Store Rankings by Total Sq. Ft. of Sales Areas

Overseas stores are shown in italics and are ranked separately from CONUS stores.

Parent agency or branch of service for each commissary is shown to right of store name and location.

AFCOMS—Air Force Commissary Service
NAVY—Navy Resale System
TSA—U.S. Army Troop Support Agency
USMC—U.S. Marine Corps

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Rank	Store/Parent Organization	Total Sq. Ft.
1	Carswell AFB, TX/**AFCOMS**	48,561
2	McChord AFB, WA/**AFCOMS**	47,705
3	Lackland AFB, TX/**AFCOMS**	41,488
4	McGuire AFB, NJ/**AFCOMS**	41,162
5	Imperial Beach, CA/**Navy**	38,600
6	Miramar, CA/**Navy**	38,600
7	Little Rock AFB, AR/**AFCOMS**	38,342
8	Ft. Bragg, NC/**TSA**	38,260
9	Wright-Patterson AFB, OH/ **AFCOMS**	38,100
10	Tinker AFB, OK/**AFCOMS**	37,228
11	Hanscom AFB, MA/**AFCOMS**	36,512
12	Little Creek, VA/**Navy**	35,912
13	Lowry AFB, CO/**AFCOMS**	35,413
14	Barksdale AFB, LA/**AFCOMS**	35,304
15	Peterson AFB, CO/**AFCOMS**	34,732
16	Ft. Hood, TX/**TSA**	34,489
17	Travis AFB, CA/**AFCOMS**	34,372
18	Vandenberg AFB, CA/ **AFCOMS**	33,319
19	Offutt AFB, NE/**AFCOMS**	32,795
20	Ft. Benning, GA/**TSA**	32,723
21	San Diego NS, CA/**Navy**	32,590
22	Cameron Station, VA/**TSA**	31,616
23	Maxwell AFB, AL/**AFCOMS**	31,580
24	Ft. Sill, OK/**TSA**	31,537
1	*Ramstein AB, FRG/AFCOMS*	31,468
2	*Elmendorf AFB, AK/AFCOMS*	31,285
25	Fairchild AFB, WA/**AFCOMS**	31,139
26	Ft. Bliss, TX/**TSA**	31,093
27	Bergstrom AFB, TX/**AFCOMS**	31,040
28	Randolph AFB, TX/**AFCOMS**	30,860
29	Charleston AFB, SC/**AFCOMS**	30,821
30	Keesler AFB, MS/**AFCOMS**	30,689
31	Mather AFB, CA/**AFCOMS**	30,516
32	Ft. Lewis, WA/**TSA**	30,280
33	Orlando, FL/**Navy**	30,155
34	Pease AFB, NH/**AFCOMS**	29,911
35	Patrick AFB, FL/**AFCOMS**	29,592
36	Ft. Knox, KY/**TSA**	29,530
3	*Kadena/AFCOMS*	29,129
37	Norton AFB, CA/**AFCOMS**	29,053
38	Andrews AFB, MD/**AFCOMS**	28,827
39	March AFB, CA/**AFCOMS**	28,810
40	Nellis AFB, NV/**AFCOMS**	28,647
41	Bolling AFB, DC/**AFCOMS**	28,365
42	Langley AFB, VA/**AFCOMS**	27,813
43	Ft. Stewart, GA/**TSA**	27,767
44	Homestead AFB, FL/**AFCOMS**	27,600
45	Scott AFB, IL/**AFCOMS**	27,339
4	*Hickam AFB, HI/AFCOMS*	27,032
46	Ft. Jackson, SC/**TSA**	27,000
47	Ft. Sam Houston, TX/**TSA**	26,904
48	Long Beach, CA/**Navy**	26,800
49	Kirtland AFB, NM/**AFCOMS**	26,638
50	Robins AFB, GA/**AFCOMS**	26,522
51	Ft. Myer, VA/**TSA**	26,000
52	Camp Pendleton, CA/USMC	26,000
53	Tyndall AFB, FL/**AFCOMS**	25,981
54	Dover AFB, DE/**AFCOMS**	25,947
55	Charleston NS, SC/**Navy**	25,727
56	Norfolk, VA/**Navy**	25,711
57	Holloman AFB, NM/**AFCOMS**	25,638
58	Ft. Campbell, KY/**TSA**	25,436
59	Malmstrom AFB, MT/ **AFCOMS**	25,301
60	MacDill AFB, FL/**AFCOMS**	25,280
61	Ft. Lee, VA/**TSA**	25,200
62	Davis-Monthan AFB, AZ/ **AFCOMS**	25,181
63	Chanute AFB, IL/**AFCOMS**	25,144
5	*Schofield Barracks, HI/TSA*	25,059
64	Walter Reed AMC, DC/**TSA**	25,000
65	El Toro, CA/USMC	25,000
6	*Yongsan, Korea/TSA*	24,824
66	Ft. Belvoir, VA/**TSA**	24,753
7	*Pearl Harbor, HI/Navy*	24,641
67	Ft. Monmouth, NJ/**TSA**	24,502
68	Sheppard AFB, TX/**AFCOMS**	24,317
69	Oceana, VA/**Navy**	23,839
8	*Clark AB, PI/AFCOMS*	23,730
70	Luke AFB, AZ/**AFCOMS**	23,700
71	Tarawa Terrace, NC/USMC	23,680
72	Ft. Riley, KS/**TSA**	23,500
73	Los Angeles AFB, CA/ **AFCOMS**	23,270
74	Presidio of S.F., CA/**TSA**	23,264
75	McConnell AFB, KS/**AFCOMS**	23,100
76	Eglin AFB, FL/**AFCOMS**	23,086
77	Pensacola, FL/**Navy**	23,044
78	Alameda, CA/**Navy**	22,835
79	Castle AFB, CA/**AFCOMS**	22,760

Rank	Store/Parent Organization	Total Sq. Ft.
80	Williams AFB, AZ/AFCOMS	22,630
9	*Misawa AB, Japan/AFCOMS*	22,496
81	Memphis, TN/Navy	22,468
82	Dyess AFB, TX/AFCOMS	22,362
83	Ft. Rucker, AL/TSA	22,260
10	*RAF Alconbury/AFCOMS*	22,257
84	Ft. Gordon, GA/TSA	22,184
85	Ft. Irwin, CA/TSA	22,059
86	Bangor, WA/Navy	22,000
11	*Fuerth, FRG/TSA*	21,870
87	Ft. Carson, CO/TSA	21,864
88	Ft. Gillem, GA/TSA	21,771
89	New London, CT/Navy	21,685
90	Portsmouth, VA/Navy	21,346
12	*Hahn AB, FRG/AFCOMS*	21,164
91	Redstone Arsenal, AL/TSA	21,035
92	C. M. Price Support Ctr./TSA	20,789
93	Columbus AFB, MS/AFCOMS	20,643
13	*RAF Greenham Common/AFCOMS*	20,405
14	*Osan AB, Korea/AFCOMS*	20,250
15	*Yokota AB, Japan/AFCOMS*	20,207
94	Moody AFB, GA/AFCOMS	20,064
95	Altus AFB, OK/AFCOMS	19,880
96	Edwards AFB, CA/AFCOMS	19,852
97	Jacksonville, FL/Navy	19,728
98	Ft. Huachuca, AZ/TSA	19,709
99	Ft. Polk, LA/TSA	19,642
100	Grissom AFB, IN/AFCOMS	19,554
101	Quantico, VA/USMC	19,500
102	Hamilton, CA/Navy	19,500
16	*Andersen AFB, Guam/AFCOMS*	19,462
17	*Rhein-Main AB, FRG/AFCOMS*	19,448
103	Ft. Eustis, VA/TSA	19,400
104	Kelly AFB, TX/AFCOMS	19,176
105	Loring AFB, ME/AFCOMS	19,052
106	Ft. Drum, NY/TSA	18,721
107	Reese AFB, TX/AFCOMS	18,700
108	Great Lakes, IN/Navy	18,700
109	Cherry Point, NC/USMC	18,655
18	*Heidelberg, FRG/TSA*	18,500
110	Whiteman AFB, MO/AFCOMS	18,313
111	Moffett Field, CA/Navy	18,280
112	McClellan AFB, CA/AFCOMS	18,248
113	Ft. Ord, CA/TSA	18,190
114	Cannon AFB, NM/AFCOMS	18,100
19	*Ft. Buchanan/TSA*	18,084
20	*Frankfurt, FRG/TSA*	17,928
115	Laughlin AFB, TX/AFCOMS	17,800
116	Ft. McNair, DC/TSA	17,800
117	Ellsworth AFB, SD/AFCOMS	17,596
118	Philadelphia, PA/Navy	17,502
119	K.I. Sawyer AFB, MI/AFCOMS	17,428
120	Hunter AAF, GA/TSA	17,400
21	*Vogelweh AB, FRG/AFCOMS*	17,349
121	Gunter AFB, AL/AFCOMS	17,330
122	Wurtsmith AFB, MI/AFCOMS	17,133
123	Hill AFB, UT/AFCOMS	17,112
22	*Berlin, FRG/TSA*	17,100
124	Ft. Leavenworth, KS/TSA	17,043
125	Seymour-Johnson AFB, NC/AFCOMS	17,035
126	Kings Bay, GA/Navy	17,000
127	Lemoore, CA/Navy	16,870
128	Mare Island, CA/Navy	16,840
23	*Hanau, FRG/TSA*	16,813
129	USAF Academy, CO/AFCOMS	16,767
130	Port Hueneme, CA/Navy	16,700
131	Hadnot Point, NC/USMC	16,627
24	*RAF Lakenheath/AFCOMS*	16,540
132	Mt. Home AFB, ID/AFCOMS	16,449
133	Grand Forks AFB, ND/AFCOMS	16,422
134	Griffiss AFB, NY/AFCOMS	16,231
135	Brooks AFB, TX/AFCOMS	16,216
25	*Torrejon AB/AFCOMS*	15,839
26	*Ft. Richardson, AK/TSA*	15,713
27	*Camp Butler (Foster)/AFCOMS*	15,681
136	Twentynine Palms, CA/USMC	15,500
137	F.E. Warren AFB, WY/AFCOMS	15,484
138	Ft. Meade, MD/TSA	15,476
139	Beale AFB, CA/AFCOMS	15,392
140	Minot AFB, ND/AFCOMS	15,329
28	*Guam/Navy*	15,303
141	Ft. McClellan, AL/TSA	15,146
29	*Giessen, FRG/TSA*	15,015
142	Shaw AFB, SC/AFCOMS	15,000
143	Ft. Leonard Wood, MO/TSA	14,910
30	*Yokosuka, Japan/Navy*	14,600
144	North Island, CA/Navy	14,415
145	Newport, RI/Navy	14,346
146	Aberdeen PG, MD/TSA	14,229
31	*Lajes Field, Azores/AFCOMS*	14,200
147	Ft. Ben Harrison, IN/TSA	14,145
148	Eaker AFB, AR/AFCOMS	14,108
149	Corpus Christi, TX/Navy	14,024
150	Albany, GA/USMC	13,980
32	*Incirlik, Turkey/AFCOMS*	13,683
151	Seattle, WA/Navy	13,500
152	New Cumberland, PA/TSA	13,390
153	Annapolis, MD/Navy	13,374
33	*Kaneohe Bay, HI/USMC*	13,300
154	San Diego NTC, CA/Navy	13,238
155	George AFB, CA/AFCOMS	13,207
34	*RAF Bentwaters/AFCOMS*	12,979
156	Plattsburgh AFB, NY/AFCOMS	12,906
157	Ft. Devens, MA/TSA	12,770
35	*Camp Courtney/AFCOMS*	12,746
158	Edgewood Arsenal, MD/TSA	12,644
36	*RAF Upper Heyford/AFCOMS*	12,624
159	Richmond DGSC, VA/TSA	12,586
160	Whidbey Island, WA/Navy	12,354
161	Bremerton, WA/Navy	12,352
162	Mitchel Field, NY/Navy	12,290
37	*Karlsruhe, FRG/TSA*	12,057
163	Hurlburt AFB, FL/AFCOMS	11,917
164	Mayport, FL/Navy	11,700
165	Brunswick, ME/Navy	11,662
166	Goodfellow AFB, TX/AFCOMS	11,660
38	*Ft. Corozal/TSA*	11,564
39	*Spangdahlem AB, FRG/AFCOMS*	11,561
167	Parris Island, SC/USMC	11,500
168	Ft. Hamilton, NY/TSA	11,400
40	*Ansbach, FRG/TSA*	11,361
169	Carlisle Barracks, PA/TSA	11,312
170	Myrtle Beach AFB, SC/AFCOMS	11,272
171	Ft. Sheridan, IL/TSA	11,087
172	Vance AFB, OK/AFCOMS	11,000
41	*Subic Bay, PI/Navy*	11,000
42	*Aviano AB, Italy/AFCOMS*	10,786
43	*Sagamihara, Japan/TSA*	10,755
44	*Aschaffenberg, FRG/TSA*	10,721
45	*Chievres, Belgium/TSA*	10,581
173	Charleston NWS, SC/Navy	10,540
46	*Bremerhaven, FRG/TSA*	10,458
47	*Comiso AS, Italy/AFCOMS*	10,422
174	Yuma, AZ/USMC	10,400
175	Cecil Field, FL/Navy	10,226
48	*Munich, FRG/TSA*	10,140
176	Gulfport, MS/Navy	10,076
49	*Soesterberg, NL/AFCOMS*	9,999
50	*Baumholder, FRG/TSA*	9,941
177	England AFB, LA/AFCOMS	9,863
51	*Eielson AFB, AK/AFCOMS*	9,794
178	Treasure Island, CA/Navy	9,696
179	Selfridge ANG Base, MI/TSA	9,687
52	*Barbers Point, HI/Navy*	9,660
180	New Orleans, LA/Navy	9,600
181	Pope AFB, NC/TSA	9,587
53	*Roosevelt Roads, PR/Navy*	9,440
182	Patuxent River, MD/Navy	9,406
54	*Kitzingen, FRG/TSA*	9,311
55	*Augsburg, FRG/TSA*	9,245
56	*Kelly Barracks, FRG/TSA*	9,240
183	Key West, FL/Navy	9,139
57	*Bamberg, FRG/TSA*	9,056
58	*Sigonella/Navy*	9,025
59	*Darmstadt, FRG/TSA*	9,006
184	Tobyhanna, PA/TSA	9,000
185	Barstow, CA/USMC	9,000

Rank	Store/Parent Organization	Total Sq. Ft.
60	*Iwakuni, Japan/USMC*	9,000
186	Meridian, MS/**Navy**	8,844
61	*Rota, Spain/Navy*	8,716
187	Fitzsimons AMC, CO/**TSA**	8,712
188	San Onofre, CA/USMC	8,700
62	*Mannheim, FRG/TSA*	8,700
63	*Adak, AK/Navy*	8,480
64	*Bitburg AB, FRG/AFCOMS*	8,426
65	*Hellenikon AB/AFCOMS*	8,395
66	*RAF Fairford/AFCOMS*	8,392
67	*Sembach AB, FRG/AFCOMS*	8,308
189	Scotia, NY/**Navy**	8,200
68	*Heilbronn, FRG/TSA*	8,176
190	Ft. McPherson, GA/**TSA**	8,100
69	*Guantanamo Bay, Cuba/Navy*	8,100
191	Vint Hill Farms, VA/**TSA**	8,088
70	*Ft. Wainwright, AK/TSA*	8,066
192	Ft. Monroe, VA/**TSA**	8,049
193	Arnold AFB, TN/**AFCOMS**	8,040
71	*Keflavik, Iceland/Navy*	7,784
72	*Ankara, Turkey/AFCOMS*	7,648
194	Whiting Field, FL/**Navy**	7,645
195	Point Mugu, CA/**Navy**	7,520
196	Stockton, CA/**Navy**	7,422
197	Bangor AFB, ME/**AFCOMS**	7,273
198	Lexington Blue Grass, KY/**TSA**	7,196
73	*Bad Kreuznach, FRG/TSA*	7,060
199	Yorktown, VA/**Navy**	7,056
74	*RAF Chicksands/AFCOMS*	7,036
200	Rock Island Arsenal, IL/**TSA**	6,944
75	*Naples/Navy*	6,804
201	White Sands, NM/**TSA**	6,768
76	*Argentia, Newfoundland/Navy*	6,726
77	*Fulda, FRG/TSA*	6,719
202	Kingsville, TX/**Navy**	6,700
203	Governor's Island, NY/**Navy**	6,700
204	ARDC (Picatinny), PA/**TSA**	6,400
78	*Ft. Shafter, HI/TSA*	6,393
205	Malonee Village, NC/**TSA**	6,360
206	New River, NC/USMC	6,344
79	*San Vito AS, Italy/AFCOMS*	6,338
80	*Atsugi, Japan/Navy*	6,326
81	*Ft. Greely, AK/TSA*	6,290
82	*Bad Nauheim, FRG/TSA*	6,176
207	Dugway Prov. Grnds., UT/**TSA**	6,062
208	Oakdale (C.E. Kelly), PA/**TSA**	6,000
209	Yuma Prov. Grnds., AZ/**TSA**	5,995
83	*Grafenwoehr, FRG/TSA*	5,952
210	Stewart AB, NY/**TSA**	5,900
84	*Gelnhausen, FRG/TSA*	5,871
85	*Livorno, Italy/TSA*	5,816
86	*Pusan, Korea/TSA*	5,734
87	*Bermuda/Navy*	5,607
211	Ft. Ritchie, MD/**TSA**	5,500
212	Beeville, TX/**Navy**	5,464
88	*Neu Ulm, FRG/TSA*	5,431
89	*Howard AFB/TSA*	5,400
213	West Point, NY/**TSA**	5,290
90	*Ft. Espinar/TSA*	5,200
91	*Izmir, Turkey/AFCOMS*	5,078
214	Lakehurst, NJ/**Navy**	5,075
92	*Taegu, Korea/TSA*	4,875
93	*Holy Loch, Scotland/Navy*	4,841
94	*Kunsan AB, Korea/AFCOMS*	4,752
95	*Illesheim, FRG/TSA*	4,701
96	*Goeppingen, FRG/TSA*	4,597
215	Dahlgren, VA/**Navy**	4,593
97	*Bad Toelz, FRG/TSA*	4,572
98	*Dhahran, Saudi Arabia/TSA*	4,544
216	Sierra AD, CA/**TSA**	4,500
217	Athens, GA/**Navy**	4,400
218	Ft. Story, VA/**TSA**	4,269
99	*Bad Aibling, FRG/TSA*	4,250
100	*Iraklion/AFCOMS*	4,206
101	*Camp Edwards, Korea/TSA*	4,205
102	*Hellenikon Branch/AFCOMS*	4,199
103	*Oslo, Norway/AFCOMS*	4,032
219	Fallon, NV/**Navy**	4,000
104	*RAF Wethersfield/AFCOMS*	3,945
220	China Lake, CA/**Navy**	3,927
105	*Zaragoza AB/AFCOMS*	3,883
221	Seneca AD, NY/**TSA**	3,866
106	*Camp Zama, Japan/TSA*	3,852
107	*Panzer, FRG/TSA*	3,840
222	El Centro, CA/**Navy**	3,760
108	*Camp Carroll, Korea/TSA*	3,560
109	*Edzell, Scotland/Navy*	3,474
110	*Bad Hersfeld, FRG/TSA*	3,390
111	*Garmisch, FRG/TSA*	3,315
112	*Cairo, Egypt/TSA*	3,253
223	Fort Fisher AFS, NC/**AFCOMS**	3,239
113	*Sasebo, Japan/Navy*	3,208
114	*Buedingen, FRG/TSA*	3,200
115	*Hessisch-Oldendorf, FRG/AFCOMS*	3,173
116	*RAF Sculthorpe/AFCOMS*	3,148
117	*Exmouth, Australia/Navy*	3,077
224	Oakland AB, CA/**TSA**	3,072
118	*Camp Humphreys, Korea/TSA*	3,065
119	*Camp Casey, Korea/TSA*	3,060
225	Avon Park, FL/**AFCOMS**	3,012
120	*Erlangen, FRG/TSA*	2,954
121	*Hannam Village, Korea/TSA*	2,950
122	*RAF Menwith Hill/AFCOMS*	2,926
123	*Babenhausen, FRG/TSA*	2,878
124	*Berchtesgaden, FRG/TSA*	2,875
125	*Germersheim, FRG/TSA*	2,787
226	Gila Bend AFS, AZ/**AFCOMS**	2,663
227	Crane, IN/**Navy**	2,650
126	*Amberg, FRG/TSA*	2,640
127	*Hohenfels, FRG/TSA*	2,621
228	Powell AFS, WY/**AFCOMS**	2,566
128	*San Miguel, PI/Navy*	2,514
129	*Kirchgoens, FRG/TSA*	2,487
130	*Neubruecke, FRG/TSA*	2,435
131	*Decimomannu, Italy/AFCOMS*	2,419
132	*Chinhae, Korea/Navy*	2,400
133	*Crailsheim, FRG/TSA*	2,390
134	*Dexheim, FRG/TSA*	2,350
135	*Herzo Base, FRG/TSA*	2,350
136	*Osterholz-Scharmbeck, FRG/TSA*	2,350
137	*Bad Kissingen, FRG/TSA*	2,347
138	*RAF Mildenhall/AFCOMS*	2,325
229	Cutler, ME/**Navy**	2,252
139	*Bindlach, FRG/TSA*	2,244
140	*Muenster, FRG/TSA*	2,200
141	*Idar Oberstein, FRG/TSA*	2,175
142	*Helmstedt, FRG/TSA*	2,130
143	*Sagami, Japan/TSA*	2,016
230	Belle Fourche AFS, SD/**AFCOMS**	2,015
231	Dickinson AFS, ND/**AFCOMS**	2,015
232	Forsyth AFS, MT/**AFCOMS**	2,015
233	Conrad AFS, MT/**AFCOMS**	2,015
234	Havre AFS, MT/**AFCOMS**	2,015
144	*Florennes, Belgium/AFCOMS*	1,914
145	*Fischbach, FRG/TSA*	1,880
235	Winter Harbor, ME/**Navy**	1,876
236	Calumet AFS, MI/**AFCOMS**	1,797
146	*Fliegerhorst, FRG/TSA*	1,780
237	Indian Springs AFAF, NV/**AFCOMS**	1,720
147	*Mainz, FRG/TSA*	1,550
148	*Pruem, FRG/AFCOMS*	1,546
149	*Giebelstadt, FRG/TSA*	1,524
150	*La Maddalena/Navy*	1,500
151	*Trier, FRG/AFCOMS*	1,476
152	*McCully Barracks, FRG/TSA*	1,440
153	*RAF Burtonwood/AFCOMS*	1,410
238	Port Austin AFS, MI/**AFCOMS**	1,400
239	Makah AFS, WA/**AFCOMS**	1,376
154	*Camp Stanley, Korea/TSA*	1,369
155	*Camp Page, Korea/TSA*	1,324
156	*Royal Oaks/AFCOMS*	1,315
157	*Bueren, FRG/TSA*	1,260
158	*Nea Makri/AFCOMS*	1,203
159	*Neckarsulm, FRG/TSA*	962
160	*Camp King, FRG/TSA*	840
161	*Camp Kure, Japan/TSA*	790
240	Holbrook AFB, AZ/**AFCOMS**	708
162	*Flensburg, FRG/TSA*	680
241	Camp Merrill, GA/**TSA**	451

All-Service Commissary Store Rankings by Average Monthly $ Sales/Square Foot . . . based on FY88 Sales

Overseas stores are shown in italics and are ranked separately from CONUS stores.

Parent agency or branch of service for each commissary is shown to right of store name and location.

AFCOMS—Air Force Commissary Service
NAVY—Navy Resale System
TSA—U.S. Army Troop Support Agency
USMC—U.S. Marine Corps

Data are unadjusted for number of shopping days, and are based on official but preliminary sales reports.

Rank	Store/Parent Organization	Avg. Mo. $ Sales/Sq. Ft.
1	*Mainz, FRG/TSA*	305
1	Ft. Meade, MD/TSA	251
2	Ft. Belvoir, VA/TSA	217
3	MacDill AFB, FL/AFCOMS	192
4	Ft. Ord, CA/TSA	171
2	*Pearl Harbor, HI/Navy*	171
5	Oakland AB, CA/TSA	160
3	*Ft. Corozal/TSA*	158
4	*Hickam AFB, HI/AFCOMS*	145
5	*Osterholz-Scharmbeck, FRG/TSA*	145
6	McClellan AFB, CA/AFCOMS	141
7	Ft. Bliss, TX/TSA	140
8	Ft. Hood, TX/TSA	138
6	*Mannheim, FRG/TSA*	138
9	West Point, NY/TSA	137
10	Ft. Lewis, WA/TSA	136
7	*Camp Stanley, Korea/TSA*	135
8	*Yongsan, Korea/TSA*	133
11	Ft. Campbell, KY/TSA	130
12	Eglin AFB, FL/AFCOMS	125
9	*Taegu, Korea/TSA*	125
13	Ft. Carson, CO/TSA	124
14	Jacksonville, FL/Navy	123
15	Malonee Village, NC/TSA	120
16	Langley AFB, VA/AFCOMS	119
17	Moffett Field, CA/Navy	118
18	Hill AFB, UT/AFCOMS	117
10	*Camp Casey, Korea/TSA*	117
19	Ft. Leonard Wood, MO/TSA	114
11	*Camp Butler (Foster)/AFCOMS*	114
20	Nellis AFB, NV/AFCOMS	113
21	Randolph AFB, TX/AFCOMS	112
12	*Howard AFB/TSA*	112
13	*Ft. Buchanan/TSA*	112
14	*Naples/Navy*	112
22	Selfridge ANG Base, MI/TSA	110
23	Ft. Ben Harrison, IN/TSA	109
24	Ft. Leavenworth, KS/TSA	109
25	Ft. Devens, MA/TSA	109
26	England AFB, LA/AFCOMS	107
27	Davis-Monthan AFB, AZ/AFCOMS	106
28	Miramar, CA/Navy	106
15	*Clark AB, PI/AFCOMS*	106
29	McGuire AFB, NJ/AFCOMS	105
30	Ft. Benning, GA/TSA	105
16	*Ft. Wainwright, AK/TSA*	105
31	Kirtland AFB, NM/AFCOMS	104
32	Andrews AFB, MD/AFCOMS	103
33	Patrick AFB, FL/AFCOMS	103
34	Luke AFB, AZ/AFCOMS	103
17	*Augsburg, FRG/TSA*	103
35	George AFB, CA/AFCOMS	101
36	Ft. Ritchie, MD/TSA	101
18	*Schofield Barracks, HI/TSA*	101
37	Ft. Sam Houston, TX/TSA	100
38	Oceana, VA/Navy	100
39	Oakdale (C.E. Kelly), PA/TSA	99
40	Seattle, WA/Navy	99
41	Ft. Bragg, NC/TSA	98
42	Ft. McClellan, AL/TSA	98
19	*Bitburg AB, FRG/AFCOMS*	98

Rank	Store/Parent Organization	Avg. Mo. $ Sales/Sq. Ft.
20	*Holy Loch, Scotland/Navy*	98
43	Wright-Patterson AFB, OH/**AFCOMS**	97
44	Ft. Knox, KY/**TSA**	97
45	Redstone Arsenal, AL/**TSA**	97
46	Whidbey Island, WA/**Navy**	96
21	*Subic Bay, PI/Navy*	96
47	Ft. Gordon, GA/**TSA**	95
48	Scott AFB, IL/**AFCOMS**	94
49	Quantico, VA/USMC	94
22	*Guam/Navy*	94
50	Ft. Gillem, GA/**TSA**	93
51	Little Creek, VA/**Navy**	93
52	Bergstrom AFB, TX/**AFCOMS**	92
53	Fitzsimons AMC, CO/**TSA**	92
23	*Hanau, FRG/TSA*	92
54	McChord AFB, WA/**AFCOMS**	91
24	*Frankfurt, FRG/TSA*	91
55	Keesler AFB, MS/**AFCOMS**	90
56	Ft. Polk, LA/**TSA**	90
57	Ft. Jackson, SC/**TSA**	90
58	Pensacola, FL/**Navy**	90
25	*RAF Lakenheath/AFCOMS*	90
59	Mather AFB, CA/**AFCOMS**	89
60	Hurlburt AFB, FL/**AFCOMS**	89
26	*Osan AB, Korea/AFCOMS*	89
61	Travis AFB, CA/**AFCOMS**	88
62	Shaw AFB, SC/**AFCOMS**	88
63	Charleston NWS, SC/**Navy**	88
64	Lackland AFB, TX/**AFCOMS**	87
65	Homestead AFB, FL/**AFCOMS**	86
66	Norton AFB, CA/**AFCOMS**	85
67	Tinker AFB, OK/**AFCOMS**	85
68	Ft. Rucker, AL/**TSA**	85
69	San Diego NS, CA/**Navy**	85
27	*Vogelweh AB, FRG/AFCOMS*	85
70	Barksdale AFB, LA/**AFCOMS**	84
71	Lowry AFB, CO/**AFCOMS**	84
72	Mayport, FL/**Navy**	84
28	*Baumholder, FRG/TSA*	84
73	March AFB, CA/**AFCOMS**	83
74	Offutt AFB, NE/**AFCOMS**	83
75	Carswell AFB, TX/**AFCOMS**	83
76	Ft. Sill, OK/**TSA**	83
77	New London, CT/**Navy**	83
78	Myrtle Beach AFB, SC/**AFCOMS**	81
79	Cameron Station, VA/**TSA**	81
80	Vint Hill Farms, VA/**TSA**	81
81	Ft. Monroe, VA/**TSA**	81
82	Alameda, CA/**Navy**	81
83	Camp Pendleton, CA/USMC	80
29	*Andersen AFB, Guam/AFCOMS*	80
84	Beale AFB, CA/**AFCOMS**	79
85	New Orleans, LA/**Navy**	79
30	*Ramstein AB, FRG/AFCOMS*	79
86	Griffiss AFB, NY/**AFCOMS**	78
31	*RAF Upper Heyford/AFCOMS*	78
32	*Heidelberg, FRG/TSA*	78
33	*Barbers Point, HI/Navy*	78
87	Plattsburgh AFB, NY/**AFCOMS**	77
88	Ft. Riley, KS/**TSA**	77
89	Carlisle Barracks, PA/**TSA**	77
90	Cherry Point, NC/USMC	77
34	*Hellenikon Branch/AFCOMS*	77
91	Charleston AFB, SC/**AFCOMS**	76
92	Peterson AFB, CO/**AFCOMS**	76
93	USAF Academy, CO/**AFCOMS**	76
94	Ft. Eustis, VA/**TSA**	76
35	*Rhein-Main AB, FRG/AFCOMS*	76
36	*Kadena/AFCOMS*	76
37	*Kaneohe Bay, HI/USMC*	76
38	*Roosevelt Roads, PR/Navy*	76
95	Seymour-Johnson AFB, NC/**AFCOMS**	75
96	Ft. Huachuca, AZ/**TSA**	75
97	El Toro, CA/USMC	75
98	Newport, RI/**Navy**	75
99	Long Beach, CA/**Navy**	75
39	*Bamberg, FRG/TSA*	74
40	*Neu Ulm, FRG/TSA*	74
100	Walter Reed AMC, DC/**TSA**	73
41	*Eielson AFB, AK/AFCOMS*	73
42	*Fuerth, FRG/TSA*	73
43	*Sembach AB, FRG/AFCOMS*	72
101	Castle AFB, CA/**AFCOMS**	71
102	Patuxent River, MD/**Navy**	71
44	*Rota, Spain/Navy*	71
103	Williams AFB, AZ/**AFCOMS**	70
104	Ft. Lee, VA/**TSA**	70
45	*Elmendorf AFB, AK/AFCOMS*	70
46	*Ft. Richardson, AK/TSA*	70
105	Ellsworth AFB, SD/**AFCOMS**	69
106	Ft. Hamilton, NY/**TSA**	69
107	Great Lakes, IN/**Navy**	69
108	Imperial Beach, CA/**Navy**	69
109	Port Hueneme, CA/**Navy**	69
110	Tyndall AFB, FL/**AFCOMS**	68
111	Aberdeen PG, MD/**TSA**	68
112	Ft. Myer, VA/**TSA**	68
47	*Spangdahlem AB, FRG/AFCOMS*	68
48	*Berlin, FRG/TSA*	68
49	*Chievres, Belgium/TSA*	68
50	*Erlangen, FRG/TSA*	68
51	*Grafenwoehr, FRG/TSA*	68
113	Memphis, TN/**Navy**	67
52	*Giessen, FRG/TSA*	67
53	*Yokosuka, Japan/Navy*	67
114	Hadnot Point, NC/USMC	66
115	Norfolk, VA/**Navy**	66
54	*Guantanamo Bay, Cuba/Navy*	66
116	Fairchild AFB, WA/**AFCOMS**	65
117	Sheppard AFB, TX/**AFCOMS**	65
118	Brunswick, ME/**Navy**	65
55	*Ft. Shafter, HI/TSA*	65
56	*Fulda, FRG/TSA*	65
119	Maxwell AFB, AL/**AFCOMS**	64
120	F.E. Warren AFB, WY/**AFCOMS**	64
121	Dover AFB, DE/**AFCOMS**	64
57	*Zaragoza AB/AFCOMS*	64
58	*Yokota AB, Japan/AFCOMS*	64
122	Ft. Sheridan, IL/**TSA**	63
59	*Bermuda/Navy*	63
123	Little Rock AFB, AR/**AFCOMS**	62
124	Bolling AFB, DC/**AFCOMS**	62
125	Goodfellow AFB, TX/**AFCOMS**	62
126	Ft. Monmouth, NJ/**TSA**	62
60	*RAF Bentwaters/AFCOMS*	62
61	*RAF Menwith Hill/AFCOMS*	62
62	*Bad Kissingen, FRG/TSA*	62
63	*Bremerhaven, FRG/TSA*	62
64	*Kitzingen, FRG/TSA*	62
127	Edwards AFB, CA/**AFCOMS**	61
128	Dyess AFB, TX/**AFCOMS**	61
129	Presidio of S.F., CA/**TSA**	61
65	*Bad Kreuznach, FRG/TSA*	61
66	*Darmstadt, FRG/TSA*	61
130	McConnell AFB, KS/**AFCOMS**	60
131	Bremerton, WA/**Navy**	60
67	*La Maddalena/Navy*	60
132	Stewart AB, NY/**TSA**	59
133	Hunter AAF, GA/**TSA**	59
134	Ft. Story, VA/**TSA**	59
135	China Lake, CA/**Navy**	59
136	Robins AFB, GA/**AFCOMS**	58
137	C. M. Price Support Ctr./**TSA**	58
138	Orlando, FL/**Navy**	58
68	*Ansbach, FRG/TSA*	58
69	*Bindlach, FRG/TSA*	58
70	*Camp King, FRG/TSA*	58
139	Mt. Home AFB, ID/**AFCOMS**	57
140	Camp Merrill, GA/**TSA**	57
141	San Diego NTC, CA/**Navy**	57
71	*Ft. Espinar/TSA*	57
142	Pease AFB, NH/**AFCOMS**	56
143	Ft. Drum, NY/**TSA**	56
144	Seneca AD, NY/**TSA**	56
72	*Torrejon AB/AFCOMS*	56
73	*Sagamihara, Japan/TSA*	56
74	*Heilbronn, FRG/TSA*	56
75	*Munich, FRG/TSA*	56
145	Tarawa Terrace, NC/USMC	55
146	Parris Island, SC/USMC	55
147	Yuma, AZ/USMC	55
148	Mare Island, CA/**Navy**	55
76	*Babenhausen, FRG/TSA*	55
77	*Livorno, Italy/TSA*	55
149	Bangor, WA/**Navy**	54
150	Portsmouth, VA/**Navy**	54
151	Grand Forks AFB, ND/**AFCOMS**	53
152	Rock Island Arsenal, IL/**TSA**	53
153	Ft. McPherson, GA/**TSA**	53
154	Gunter AFB, AL/**AFCOMS**	52
155	Minot AFB, ND/**AFCOMS**	52
156	Tobyhanna, PA/**TSA**	52

Rank	Store/Parent Organization	Avg. Mo. $ Sales/Sq. Ft.
157	Ft. Stewart, GA/TSA	51
158	Annapolis, MD/Navy	51
159	Cecil Field, FL/Navy	51
78	*Hahn AB, FRG/AFCOMS*	51
79	*Royal Oaks/AFCOMS*	51
80	*Bad Nauheim, FRG/TSA*	51
81	*Flensburg, FRG/TSA*	51
82	*Giebelstadt, FRG/TSA*	51
160	Fallon, NV/Navy	50
83	*Karlsruhe, FRG/TSA*	50
161	Mitchel Field, NY/Navy	49
84	*Misawa AB, Japan/AFCOMS*	49
85	*Illesheim, FRG/TSA*	49
86	*Keflavik, Iceland/Navy*	49
162	Eaker AFB, AR/AFCOMS	48
163	New River, NC/USMC	48
164	Athens, GA/Navy	48
87	*Goeppingen, FRG/TSA*	48
88	*Atsugi, Japan/Navy*	48
165	Lakehurst, NJ/Navy	47
89	*San Vito AS, Italy/AFCOMS*	47
90	*Cairo, Egypt/TSA*	47
91	*Sigonella/Navy*	47
166	Vandenberg AFB, CA/AFCOMS	46
167	Moody AFB, GA/AFCOMS	46
168	Chanute AFB, IL/AFCOMS	46
169	Whiteman AFB, MO/AFCOMS	46
170	Holloman AFB, NM/AFCOMS	46
171	White Sands, NM/TSA	46
92	*Aschaffenberg, FRG/TSA*	46
93	*Fliegerhorst, FRG/TSA*	46
94	*Hannam Village, Korea/TSA*	45
95	*Sasebo, Japan/Navy*	45
172	Twentynine Palms, CA/USMC	44
173	Gulfport, MS/Navy	44
174	Philadelphia, PA/Navy	44
175	Key West, FL/Navy	44
176	Lemoore, CA/Navy	44
96	*Kunsan AB, Korea/AFCOMS*	44
97	*Pusan, Korea/TSA*	44
98	*Gelnhausen, FRG/TSA*	44
177	K.I. Sawyer AFB, MI/AFCOMS	43
178	Wurtsmith AFB, MI/AFCOMS	43
179	Altus AFB, OK/AFCOMS	43
180	San Onofre, CA/USMC	43
99	*Florennes, Belgium/AFCOMS*	43
100	*Izmir, Turkey/AFCOMS*	43
101	*Hohenfels, FRG/TSA*	43
102	*San Miguel, PI/Navy*	43
181	Arnold AFB, TN/AFCOMS	42
182	Hanscom AFB, MA/AFCOMS	42
183	Edgewood Arsenal, MD/TSA	42
184	Whiting Field, FL/Navy	42
185	Hamilton, CA/Navy	42
103	*Amberg, FRG/TSA*	42
104	*Adak, AK/Navy*	42
186	Los Angeles AFB, CA/AFCOMS	41
187	Grissom AFB, IN/AFCOMS	41
188	Loring AFB, ME/AFCOMS	41
189	Malmstrom AFB, MT/AFCOMS	41
190	Lexington Blue Grass, KY/TSA	41
191	Corpus Christi, TX/Navy	41
192	North Island, CA/Navy	41
105	*Crailsheim, FRG/TSA*	41
193	Columbus AFB, MS/AFCOMS	40
194	Cannon AFB, NM/AFCOMS	40
195	New Cumberland, PA/TSA	40
106	*Kirchgoens, FRG/TSA*	40
196	Avon Park, FL/AFCOMS	39
197	Stockton, CA/Navy	39
107	*Iraklion/AFCOMS*	39
108	*Aviano AB, Italy/AFCOMS*	39
198	Sierra AD, CA/TSA	38
199	Scotia, NY/Navy	38
109	*Camp Carroll, Korea/TSA*	38
200	ARDC (Picatinny), PA/TSA	37
201	Meridian, MS/Navy	37
202	Yorktown, VA/Navy	37
110	*Hessisch-Oldendorf, FRG/AFCOMS*	37
111	*RAF Chicksands/AFCOMS*	37
203	Vance AFB, OK/AFCOMS	36
204	Point Mugu, CA/Navy	36
112	*Kelly Barracks, FRG/TSA*	36
205	Richmond DGSC, VA/TSA	35
113	*Bad Hersfeld, FRG/TSA*	35
114	*Berchtesgaden, FRG/TSA*	35
115	*Dexheim, FRG/TSA*	35
116	*Garmisch, FRG/TSA*	35
117	*Herzo Base, FRG/TSA*	35
206	Albany, GA/USMC	34
207	Barstow, CA/USMC	34
118	*Incirlik, Turkey/AFCOMS*	34
119	*Soesterberg, NL/AFCOMS*	34
120	*Buedingen, FRG/TSA*	34
121	*Iwakuni, Japan/USMC*	34
122	*Edzell, Scotland/Navy*	34
208	Brooks AFB, TX/AFCOMS	33
209	Kelly AFB, TX/AFCOMS	33
123	*Ankara, Turkey/AFCOMS*	33
124	*RAF Alconbury/AFCOMS*	32
125	*RAF Fairford/AFCOMS*	32
126	*Lajes Field, Azores/AFCOMS*	32
127	*Bueren, FRG/TSA*	32
210	Holbrook AFB, AZ/AFCOMS	31
211	Reese AFB, TX/AFCOMS	31
212	Beeville, TX/Navy	31
128	*Camp Page, Korea/TSA*	31
129	*Ft. Greely, AK/TSA*	30
213	Yuma Prov. Grnds., AZ/TSA	29
214	Charleston NS, SC/Navy	29
130	*Pruem, FRG/AFCOMS*	29
131	*Camp Zama, Japan/TSA*	29
215	Bangor AFB, ME/AFCOMS	28
216	Treasure Island, CA/Navy	28
132	*Bad Aibling, FRG/TSA*	28
133	*Oslo, Norway/AFCOMS*	27
134	*Camp Humphreys, Korea/TSA*	27
135	*Bad Toelz, FRG/TSA*	27
217	Winter Harbor, ME/Navy	26
136	*Idar Oberstein, FRG/TSA*	26
218	Laughlin AFB, TX/AFCOMS	24
137	*RAF Wethersfield/AFCOMS*	24
138	*Neubruecke, FRG/TSA*	24
219	Kingsville, TX/Navy	23
139	*Comiso AS, Italy/AFCOMS*	23
220	Dugway Prov. Grnds., UT/TSA	22
221	Cutler, ME/Navy	22
140	*McCully Barracks, FRG/TSA*	22
141	*Muenster, FRG/TSA*	22
142	*Hellenikon AB/AFCOMS*	21
143	*Camp Edwards, Korea/TSA*	21
144	*Neckarsulm, FRG/TSA*	21
222	Ft. McNair, DC/TSA	20
223	Ft. Irwin, CA/TSA	20
224	Dahlgren, VA/Navy	20
225	Kings Bay, GA/Navy	20
226	El Centro, CA/Navy	20
145	*RAF Mildenhall/AFCOMS*	20
146	*Chinhae, Korea/Navy*	20
147	*RAF Greenham Common/AFCOMS*	19
148	*Dhahran, Saudi Arabia/TSA*	18
149	*Exmouth, Australia/Navy*	18
227	Crane, IN/Navy	17
228	Governor's Island, NY/Navy	16
229	Port Austin AFS, MI/AFCOMS	15
150	*Germersheim, FRG/TSA*	15
230	Calumet AFS, MI/AFCOMS	14
151	*RAF Burtonwood/AFCOMS*	14
152	*RAF Sculthorpe/AFCOMS*	14
153	*Sagami, Japan/TSA*	13
231	Indian Springs AFAF, NV/ AFCOMS	12
232	Makah AFS, WA/AFCOMS	12
233	Powell AFS, WY/AFCOMS	12
234	Gila Bend AFS, AZ/AFCOMS	12
235	Pope AFB, NC/TSA	10
154	*Fischbach, FRG/TSA*	10
236	Dickinson AFS, ND/AFCOMS	9
155	*Trier, FRG/AFCOMS*	9
156	*Camp Courtney/AFCOMS*	9
157	*Argentia, Newfoundland/Navy*	9
237	Forsyth AFS, MT/AFCOMS	8
238	Havre AFS, MT/AFCOMS	8
239	Fort Fisher AFS, NC/AFCOMS	8
158	*Nea Makri/AFCOMS*	8
159	*Helmstedt, FRG/TSA*	7
160	*Decimomannu, Italy/AFCOMS*	5
240	Belle Fourche AFS, SD/AFCOMS	4
241	Conrad AFS, MT/AFCOMS	4
161	*Camp Kure, Japan/TSA*	4
162	*Panzer, FRG/TSA*	1

All-Service Commissary Store Rankings by ACV . . . based on FY88 Sales

Overseas stores are shown in italics. ACVs for these stores represent their share of the total combined sales of all overseas commissaries.

CONUS stores represent their share of the total combined sales of all CONUS commissaries. Accordingly, two separate rankings, one for CONUS stores and one for overseas stores, are shown for all commissaries worldwide.

Parent agency or branch of service for each commissary is shown to right of store name and location.

AFCOMS—Air Force Commissary Service
NAVY—Navy Resale System
TSA—U.S. Army Troop Support Agency
USMC—U.S. Marine Corps

Data are unadjusted for number of shopping days, and are based on official but preliminary sales reports.

Rank	Store/Parent Organization	ACV
1	*Pearl Harbor, HI/Navy*	4.05
2	*Hickam AFB, HI/AFCOMS*	3.77
3	*Yongsan, Korea/TSA*	3.17
4	*Schofield Barracks, HI/USA*	2.43
5	*Clark AB, PI/*AFCOMS	2.42
6	*Ramstein AB, FRG/*AFCOMS	2.39
7	*Kadena/AFCOMS*	2.13
8	*Elmendorf AFB, AK/AFCOMS*	2.10
9	*Ft. Buchanan/TSA*	1.95
10	*Ft. Corozal/TSA*	1.76
11	*Osan AB, Korea/AFCOMS*	1.73
12	*Camp Butler (Foster)/AFCOMS*	1.72
1	Ft. Belvoir, VA/TSA	1.63
13	*Frankfurt, FRG/TSA*	1.56
14	*Fuerth, FRG/TSA*	1.53
15	*Andersen AFB, Guam/AFCOMS*	1.50
16	*Hanau, FRG/TSA*	1.48
2	MacDill AFB, FL/AFCOMS	1.47
3	Ft. Hood, TX/TSA	1.44
17	*RAF Lakenheath/AFCOMS*	1.44
18	*Rhein-Main AB, FRG/AFCOMS*	1.43
19	*Vogelweh AB, FRG/AFCOMS*	1.42
20	*Heidelberg, FRG/TSA*	1.39
21	*Guam/Navy*	1.38
4	Ft. Bliss, TX/TSA	1.32
5	McGuire AFB, NJ/AFCOMS	1.31
6	McChord AFB, WA/AFCOMS	1.31
7	Ft. Lewis, WA/TSA	1.25
8	Miramar, CA/Navy	1.24
22	*Yokota AB, Japan/AFCOMS*	1.24
9	Carswell AFB, TX/AFCOMS	1.22
10	Ft. Meade, MD/TSA	1.18
23	*Mannheim, FRG/TSA*	1.15
11	Ft. Bragg, NC/TSA	1.14
12	Wright-Patterson AFB, OH/AFCOMS	1.12
24	*Berlin, FRG/TSA*	1.11
13	Lackland AFB, TX/AFCOMS	1.10
14	Randolph AFB, TX/AFCOMS	1.05
25	*Misawa AB, Japan/AFCOMS*	1.05
26	*Ft. Richardson, AK/TSA*	1.05
15	Ft. Benning, GA/TSA	1.04
27	*Hahn AB, FRG/AFCOMS*	1.03
28	*Subic Bay, PI/Navy*	1.02
16	Ft. Campbell, KY/TSA	1.01
17	Little Creek, VA/Navy	1.01
18	Langley AFB, VA/AFCOMS	1.00
19	Nellis AFB, NV/AFCOMS	.98
29	*Giessen, FRG/TSA*	.97
30	*Kaneohe Bay, HI/USMC*	.97
20	Tinker AFB, OK/AFCOMS	.96
31	*RAF Upper Heyford/AFCOMS*	.95
32	*Yokosuka, Japan/Navy*	.95
21	Ft. Ord, CA/TSA	.94

Rank	Store/Parent Organization	ACV
22	Patrick AFB, FL/**AFCOMS**	.92
33	*Augsburg, FRG/TSA*	.92
23	Travis AFB, CA/**AFCOMS**	.91
24	Barksdale AFB, LA/**AFCOMS**	.90
25	Lowry AFB, CO/**AFCOMS**	.90
26	Eglin AFB, FL/**AFCOMS**	.87
27	Ft. Knox, KY/**TSA**	.87
28	Andrews AFB, MD/**AFCOMS**	.86
29	Bergstrom AFB, TX/**AFCOMS**	.86
34	*Torrejon AB/AFCOMS*	.85
30	Keesler AFB, MS/**AFCOMS**	.84
31	Kirtland AFB, NM/**AFCOMS**	.84
32	San Diego NS, CA/**Navy**	.84
33	Offutt AFB, NE/**AFCOMS**	.83
34	Mather AFB, CA/**AFCOMS**	.82
35	Ft. Carson, CO/**TSA**	.82
36	Davis-Monthan AFB, AZ/**AFCOMS**	.81
37	Ft. Sam Houston, TX/**TSA**	.81
35	*Ft. Wainwright, AK/TSA*	.81
38	Peterson AFB, CO/**AFCOMS**	.80
39	Imperial Beach, CA/**Navy**	.80
36	*Baumholder, FRG/TSA*	.80
40	Ft. Sill, OK/**TSA**	.79
37	*Bitburg AB, FRG/AFCOMS*	.79
41	McClellan AFB, CA/**AFCOMS**	.78
42	Scott AFB, IL/**AFCOMS**	.78
43	Cameron Station, VA/**TSA**	.78
38	*RAF Bentwaters/AFCOMS*	.77
39	*Spangdahlem AB, FRG/*AFCOMS	.76
44	Norton AFB, CA/**AFCOMS**	.75
45	Luke AFB, AZ/**AFCOMS**	.74
46	Ft. Jackson, SC/**TSA**	.74
47	Jacksonville, FL/**Navy**	.74
48	Oceana, VA/**Navy**	.73
40	*Naples/Navy*	.73
41	*Barbers Point, HI/Navy*	.73
49	March AFB, CA/**AFCOMS**	.72
50	Little Rock AFB, AR/**AFCOMS**	.72
51	Homestead AFB, FL/**AFCOMS**	.72
52	Charleston AFB, SC/**AFCOMS**	.71
42	*Roosevelt Roads, PR/Navy*	.69
43	*Chievres, Belgium/TSA*	.69
44	*RAF Alconbury/AFCOMS*	.68
45	*Eielson AFB, AK/AFCOMS*	.68
53	Moffett Field, CA/**Navy**	.65
54	Ft. Gordon, GA/**TSA**	.64
46	*Bamberg, FRG/TSA*	.64
55	Camp Pendleton, CA/**USMC**	.63
56	Pensacola, FL/**Navy**	.63
47	*Ansbach, FRG/TSA*	.63
57	Redstone Arsenal, AL/**TSA**	.62
48	*Bremerhaven, FRG/TSA*	.62
58	Maxwell AFB, AL/**AFCOMS**	.61
59	Hill AFB, UT/**AFCOMS**	.61
60	Ft. Gillem, GA/**TSA**	.61
61	Long Beach, CA/**Navy**	.61
49	*Rota, Spain/Navy*	.60
62	Fairchild AFB, WA/**AFCOMS**	.59
50	*Taegu, Korea/TSA*	.59
63	Ft. Rucker, AL/**TSA**	.58
51	*Howard AFB/TSA*	.58
52	*Sagamihara, Japan/TSA*	.58
53	*Karlsruhe, FRG/TSA*	.58
64	El Toro, CA/**USMC**	.57
54	*Sembach AB, FRG/AFCOMS*	.57
65	Ft. Leavenworth, KS/**TSA**	.56
66	Alameda, CA/**Navy**	.56
55	*Kitzingen, FRG/TSA*	.56
67	Ft. Riley, KS/**TSA**	.55
68	Walter Reed AMC, DC/**TSA**	.55
69	Quantico, VA/**USMC**	.55
56	*Munich, FRG/TSA*	.55
70	Ft. Polk, LA/**TSA**	.54
71	New London, CT/**Navy**	.54
72	Tyndall AFB, FL/**AFCOMS**	.53
73	Bolling AFB, DC/**AFCOMS**	.53
74	Ft— Myer, VA/**TSA**	.53
75	Ft. Lee, VA/**TSA**	.53
76	Orlando, FL/**Navy**	.53
57	*Darmstadt, FRG/TSA*	.53
77	Norfolk, VA/**Navy**	.52
58	*Guantanamo Bay, Cuba/Navy*	.52
78	Pease AFB, NH/**AFCOMS**	.51
79	Ft. Leonard Wood, MO/**TSA**	.51
80	Dover AFB, DE/**AFCOMS**	.50
81	Castle AFB, CA/**AFCOMS**	.49
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89	Memphis, TN/**Navy**	.46
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90	Ft. Eustis, VA/**TSA**	.45
91	Ft. McClellan, AL/**TSA**	.45
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62	*Incirlik, Turkey/AFCOMS*	.45
63	*Mainz, FRG/TSA*	.45
93	Cherry Point, NC/**USMC**	.44
64	*Lajes Field, Azores/AFCOMS*	.44
65	*Heilbronn, FRG/TSA*	.44
94	Ft. Stewart, GA/**TSA**	.43
95	Presidio of S.F., CA/**TSA**	.43
96	McConnell AFB, KS/**AFCOMS**	.42
97	Ft. Devens, MA/**TSA**	.42
66	*Fulda, FRG/TSA*	.42
98	Dyess AFB, TX/**AFCOMS**	.41
67	*Aviano AB, Italy/AFCOMS*	.41
68	*Soesterberg, NL/AFCOMS*	.41
69	*Bad Kreuznach, FRG/TSA*	.41
70	Sigonella/**Navy**	.41
99	George AFB, CA/**AFCOMS**	.40
100	Shaw AFB, SC/**AFCOMS**	.40
101	Seattle, WA/**Navy**	.40
71	*Ft. Shafter, HI/TSA*	.40
102	Seymour-Johnson AFB, NC/**AFCOMS**	.39
103	USAF Academy, CO/**AFCOMS**	.39
104	Tarawa Terrace, NC/**USMC**	.39
105	Great Lakes, IN/**Navy**	.39
72	*Grafenwoehr, FRG/TSA*	.39
106	Griffiss AFB, NY/**AFCOMS**	.38
73	*Neu Ulm, FRG/TSA*	.38
107	Beale AFB, CA/**AFCOMS**	.37
108	Edwards AFB, CA/**AFCOMS**	.37
109	Ellsworth AFB, SD/**AFCOMS**	.37
74	*RAF Greenham Common/AFCOMS*	.37
75	*Keflavik, Iceland/Navy*	.37
110	Holloman AFB, NM/**AFCOMS**	.36
111	C. M. Price Support Ctr./**TSA**	.36
112	Bangor, WA/**Navy**	.36
113	Whidbey Island, WA/**Navy**	.36
114	Chanute AFB, IL/**AFCOMS**	.35
115	Portsmouth, VA/**Navy**	.35
116	Port Hueneme, CA/**Navy**	.35
76	*Adak, AK/Navy*	.35
77	*Camp Casey, Korea/TSA*	.34
78	*Bermuda/Navy*	.34
117	Hadnot Point, NC/**USMC**	.33
118	Newport, RI/**Navy**	.33
79	*Osterholz-Scharmbeck, FRG/TSA*	.33
119	England AFB, LA/**AFCOMS**	.32
120	Hurlburt AFB, FL/**AFCOMS**	.32
121	Selfridge ANG Base, MI/**TSA**	.32
122	Ft. Drum, NY/**TSA**	.32
80	*Kelly Barracks, FRG/TSA*	.32
123	Malmstrom AFB, MT/**AFCOMS**	.31
124	Hunter AAF, GA/**TSA**	.31
81	*Hellenikon Branch/AFCOMS*	.31
82	*Livorno, Italy/TSA*	.31
125	F.E. Warren AFB, WY/**AFCOMS**	.30
126	Plattsburgh AFB, NY/**AFCOMS**	.30
127	Mayport, FL/**Navy**	.30
83	*Bad Nauheim, FRG/TSA*	.30
128	Los Angeles AFB, CA/**AFCOMS**	.29
129	Mt. Home AFB, ID/**AFCOMS**	.29
130	Aberdeen PG, MD/**TSA**	.29
84	*San Vito AS, Italy/AFCOMS*	.29
85	*Panama CDC/TSA*	.29
86	*Iwakuni, Japan/USMC*	.29
87	*Atsugi, Japan/Navy*	.29
131	Moody AFB, GA/**AFCOMS**	.28
132	Myrtle Beach AFB, SC/**AFCOMS**	.28
133	Charleston NWS, SC/**Navy**	.28
134	Mare Island, CA/**Navy**	.28
88	*Ft. Espinar/TSA*	.28

Rank	Store/Parent Organization	ACV
135	Gunter AFB, AL/**AFCOMS**	.27
136	Grand Forks AFB, ND/**AFCOMS**	.27
137	Altus AFB, OK/**AFCOMS**	.26
138	Carlisle Barracks, PA/**TSA**	.26
89	*RAF Fairford/AFCOMS*	.26
139	Columbus AFB, MS/**AFCOMS**	.25
140	Whiteman AFB, MO/**AFCOMS**	.25
141	Hamilton, CA/**Navy**	.25
90	*RAF Chicksands/AFCOMS*	.25
91	*Gelnhausen, FRG/TSA*	.25
142	Grissom AFB, IN/**AFCOMS**	.24
143	Minot AFB, ND/**AFCOMS**	.24
144	Loring AFB, ME/**AFCOMS**	.24
145	Fitzsimons AMC, CO/**TSA**	.24
146	Ft. Hamilton, NY/**TSA**	.24
147	Philadelphia, PA/**Navy**	.24
92	*Ankara, Turkey/AFCOMS*	.24
93	*Pusan, Korea/TSA*	.24
148	K.I. Sawyer AFB, MI/**AFCOMS**	.23
149	Malonee Village, NC/**TSA**	.23
153	San Diego NTC, CA/**Navy**	.23
94	*Zaragoza AB/AFCOMS*	.24
150	New Orleans, LA/**Navy**	.23
151	Brunswick, ME/**Navy**	.23
152	Charleston NS, SC/**Navy**	.23
95	*Comiso AS, Italy/AFCOMS*	.23
154	Wurtsmith AFB, MI/**AFCOMS**	.22
155	Goodfellow AFB, TX/**AFCOMS**	.22
156	Cannon AFB, NM/**AFCOMS**	.22
157	West Point, NY/**TSA**	.22
158	Bremerton, WA/**Navy**	.22
159	Lemoore, CA/**Navy**	.22
96	*Kunsan AB, Korea/AFCOMS*	.22
97	*Illesheim, FRG*/**TSA**	.22
160	Eaker AFB, AR/**AFCOMS**	.21
161	Ft. Sheridan, IL/**TSA**	.21
162	Annapolis, MD/**Navy**	.21
98	*Izmir, Turkey/AFCOMS*	.21
99	*Goeppingen, FRG/TSA*	.21
163	Vint Hill Farms, VA/**TSA**	.20
164	Ft. Monroe, VA/**TSA**	.20
165	Twentynine Palms, CA/**USMC**	.20
166	Patuxent River, MD/**Navy**	.20
167	Kelly AFB, TX/**AFCOMS**	.19
168	Parris Island, SC/**USMC**	.19
100	*Erlangen, FRG/TSA*	.19
169	Reese AFB, TX/**AFCOMS**	.18
170	Oakdale (C.E. Kelly), PA/**TSA**	.18
171	Mitchel Field, NY/**Navy**	.18
172	North Island, CA/**Navy**	.18
101	*Camp Stanley, Korea/TSA*	.18
102	*Ft. Greely, AK/TSA*	.18
103	*Ludwigsburg, FRG/TSA*	.18
173	Ft. Ritchie, MD/**TSA**	.17
174	Yuma, AZ/**USMC**	.17
175	Corpus Christi, TX/**Navy**	.17
104	*Hellenikon AB/AFCOMS*	.17
105	*RAF Menwith Hill/AFCOMS*	.17
176	Brooks AFB, TX/**AFCOMS**	.16
177	Edgewood Arsenal, MD/**TSA**	.16
178	New Cumberland, PA/**TSA**	.16
179	Cecil Field, FL/**Navy**	.16
106	*Iraklion/AFCOMS*	.16
180	Oakland AB, CA/**TSA**	.15
181	Albany, GA/**USMC**	.15
107	*Babenhausen, FRG/TSA*	.15
108	*Cairo, Egypt/TSA*	.15
182	Tobyhanna, PA/**TSA**	.14
183	Gulfport, MS/**Navy**	.14
109	*Bad Kissingen, FRG/TSA*	.14
110	*Sasebo, Japan/Navy*	.14
184	Laughlin AFB, TX/**AFCOMS**	.13
185	Ft. McPherson, GA/**TSA**	.13
186	Richmond DGSC, VA/**TSA**	.13
187	Ft. Irwin, CA/**TSA**	.13
111	*Camp Carroll, Korea/TSA*	.13
112	*Hannam Village, Korea/TSA*	.13
113	*Bindlach, FRG/TSA*	.13
188	Vance AFB, OK/**AFCOMS**	.12
189	Key West, FL/**Navy**	.12
114	*Bad Toelz, FRG/TSA*	.12
190	Rock Island Arsenal, IL/**TSA**	.11
191	Ft. McNair, DC/**TSA**	.11
192	Stewart AB, NY/**TSA**	.11
193	San Onofre, CA/**USMC**	.11
194	Kings Bay, GA/**Navy**	.11
115	*Hessisch-Oldendorf, FRG/AFCOMS*	.11
116	*Camp Courtney/AFCOMS*	.11
117	*Camp Zama, Japan/TSA*	.11
118	*Amberg, FRG/TSA*	.11
119	*Bad Aibling, FRG/TSA*	.11
120	*Bad Hersfeld, FRG/TSA*	.11
121	*Garmisch, FRG/TSA*	.11
122	*Hohenfels, FRG/TSA*	.11
123	*Edzell, Scotland/Navy*	.11
195	Arnold AFB, TN/**AFCOMS**	.10
196	Meridian, MS/**Navy**	.10
197	Whiting Field, FL/**Navy**	.10
124	*Oslo, Norway/AFCOMS*	.10
125	*Buedingen, FRG/TSA*	.10
126	*Kirchgoens, FRG/TSA*	.10
127	*San Miguel, PI/Navy*	.10
128	*Berchtesgaden, FRG/TSA*	.10
198	White Sands, NM/**TSA**	.09
199	Lexington Blue Grass, KY/**TSA**	.09
200	New River, NC/**USMC**	.09
201	Barstow, CA/**USMC**	.09
202	Scotia, NY/**Navy**	.09
203	Stockton, CA/**Navy**	.09
129	*RAF Wethersfield/AFCOMS*	.09
130	*Camp Edwards, Korea/TSA*	.09
131	*Crailsheim, FRG/TSA*	.09
132	*La Maddalena/Navy*	.09
204	Ft. Story, VA/**TSA**	.08
205	Yorktown, VA/**Navy**	.08
206	Treasure Island, CA/**Navy**	.08
207	Point Mugu, CA/**Navy**	.08
133	*Florennes, Belgium/AFCOMS*	.08
134	*Camp Humphreys, Korea/TSA*	.08
135	*Dexheim, FRG/TSA*	.08
136	*Dhahran, Saudi Arabia/TSA*	.08
137	*Herzo Base, FRG/TSA*	.08
138	*Fliegerhorst, FRG/TSA*	.08
208	ARDC (Picatinny), PA/**TSA**	.07
209	Seneca AD, NY/**TSA**	.07
210	Lakehurst, NJ/**Navy**	.07
211	China Lake, CA/**Navy**	.07
139	*Giebelstadt, FRG/TSA*	.07
212	Athens, GA/**Navy**	.06
213	Fallon, NV/**Navy**	.06
140	*Royal Oaks/AFCOMS*	.06
141	*Neubruecke, FRG/TSA*	.06
142	*Argentia, Newfoundland/Navy*	.06
214	Sierra AD, CA/**TSA**	.05
215	Yuma Prov. Grnds., AZ/**TSA**	.05
216	Beeville, TX/**Navy**	.05
217	Kingsville, TX/**Navy**	.05
143	*Camp King, FRG/TSA*	.05
144	*Idar Oberstein, FRG/TSA*	.05
145	*Muenster, FRG/TSA*	.05
146	*Chinhae, Korea/Navy*	.05
147	*Exmouth, Australia/Navy*	.05
218	Avon Park, FL/**AFCOMS**	.04
219	Dugway Prov. Grnds., UT/**TSA**	.04
148	*Pruem, FRG/AFCOMS*	.04
149	*RAF Sculthorpe/AFCOMS*	.04
150	*Camp Page, Korea/TSA*	.04
151	*Bueren, FRG/TSA*	.04
152	Germersheim, FRG/**TSA**	.04
220	Pope AFB, NC/**TSA**	.03
221	Dahlgren, VA/**Navy**	.03
153	*Sagami, Japan/TSA*	.03
154	*Flensburg, FRG/TSA*	.03
155	*McCully Barracks, FRG/TSA*	.03
222	Cutler, ME/**Navy**	.02
223	El Centro, CA/**Navy**	.02
156	*RAF Burtonwood/AFCOMS*	.02
157	*Fischbach, FRG/TSA*	.02
158	*Mainz Kastel (CDC)/TSA*	.02
159	*Neckarsulm, FRG/TSA*	.02
224	Port Austin AFS, MI/**AFCOMS**	.01
225	Powell AFS, WY/**AFCOMS**	.01
226	Fort Fisher AFS, NC/**AFCOMS**	.01
227	Gila Bend AFS, AZ/**AFCOMS**	.01
228	Holbrook AFB, AZ/**AFCOMS**	.01
229	Camp Merrill, GA/**TSA**	.01
230	Governor's Island, NY/**Navy**	.01
231	Winter Harbor, ME/**Navy**	.01
232	Crane, IN/**Navy**	.01
160	*Trier, FRG/AFCOMS*	.01
161	*Helmstedt, FRG/TSA*	.01

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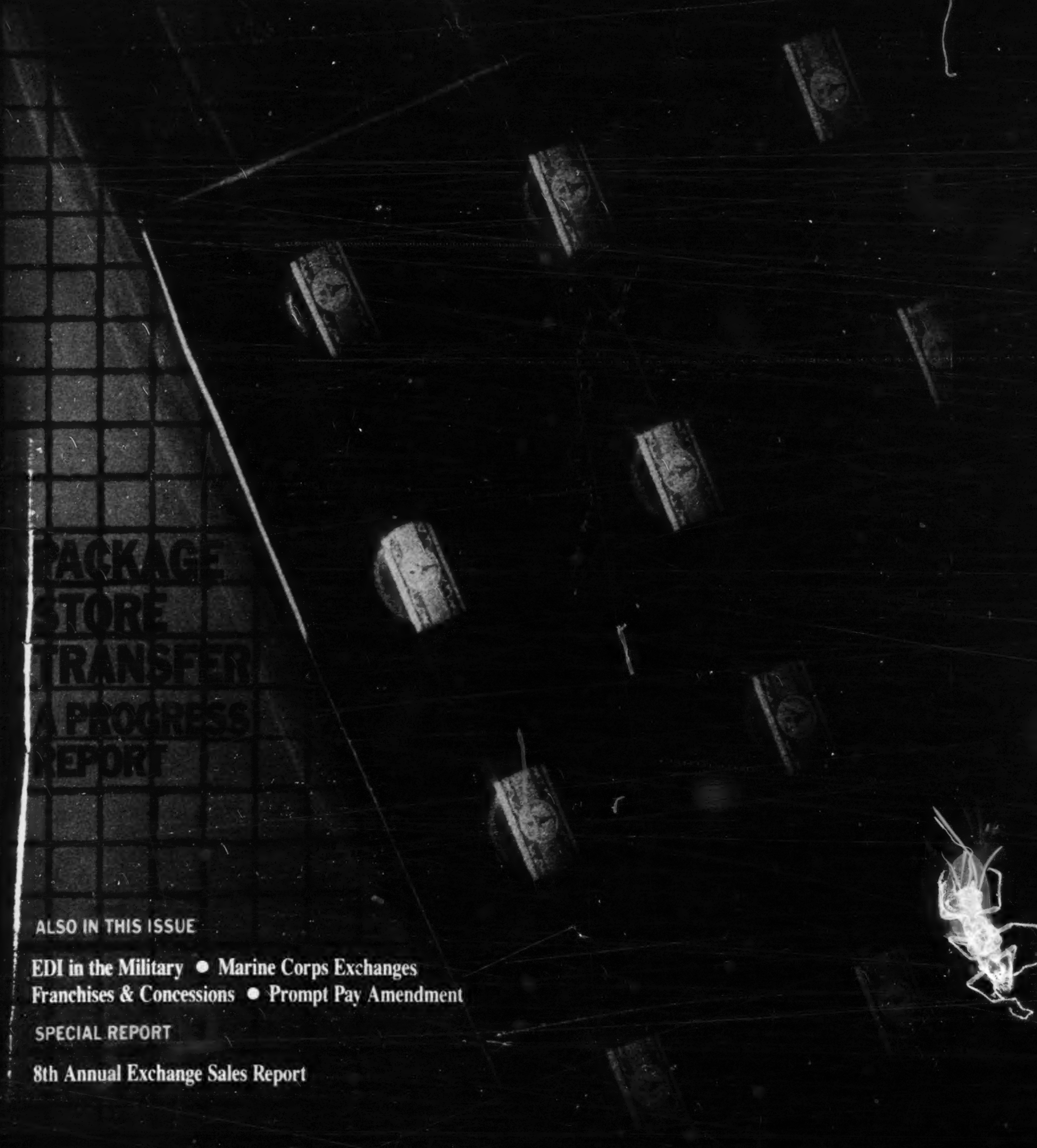

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SPECIAL REPORT

8th Annual Exchange Sales Report

PUBLISHED BY THE AMERICAN LOGISTICS ASSOCIATION

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Package Store Transfer: A Progress Report

BY JIM OSTROFF

Class Six
AAFES

To hear the military's exchange services executives tell it, their takeover of package store operations from Morale, Welfare and Recreation agencies was a textbook case of how to transfer a half-billion dollar business with little pain and a lot of gain—streamlining management, boosting productivity, as well as the vital bottom line.

Hardnosed business executives might demur such military boasts smack of Pentagon puffery, designed to camouflage a wrenching bureaucratic reshuffling that enlarged the resale system's fiefdom, masking an untenable situation where the services seek to boost package stores sales while discouraging alcohol consumption.

Just don't ask the beer, wine and distilled spirits industry to buy this argument. Its equally hardnosed executives more often than not outdo their exchange counterparts in praising the "new" Class Six operations; bubbling with enthusiasm for a system they say puts the military's booze business on a solid financial footing, improving the industry's chances to earn a buck off package store sales.

"Previously, package store managers were pretty much left alone so long as their stores were profitable. But like any business there were some managers who were not that concerned about store layout, or selection,' said Terry McAuley, military sales manager with Anheuser-Busch, St. Louis, the nation's biggest brewer. "The changes now being implemented, use of planograms and master stock assortments (MSAs), not only make the stores more appealing to the military customer, but improve their profitability," which McAuley said should buoy his firm's military beer sales prospects.

Decisions to institute package store planograms and MSAs are both praised and questioned by the industry.

None of this is meant to imply, though, that the industry and military exchanges are engaged in a love feast. Executives within the beer, wine and distilled spirits business fret that efforts by the Army and Air Force Exchange Service (AAFES) and the Navy Resale Services Support Office (NAVRESSO) to boost profits by streamlining alcoholic beverage inventories, will force some of the companies' brands off package store shelves. Equally worrisome to these vendors is the lack of a defined mechanism for incorporating future new products into the stores' inventories, a real concern for firms who derive about seven percent of their national sales from military accounts. Nonetheless, industry executives say the package store transfer deserves *their* best efforts to make it work. "So far, it's more or less been business as usual in working with the 'new' package store personnel," said Haven Moses, national military sales manager with the Coors Brewing Co., Golden, CO. "I think we'll see an evolution in the business that will give us a chance to work with the exchanges as time goes on, and them with us," Moses said.

Consistent with an evolutionary approach, the three exchange groups are slowly adopting changes in both management and store operations. Unlike corporations which often clean house after taking over another company, housecleaning in package stores following the exchanges' takeover mainly entailed the liberal use of elbow grease to spruce up these outlets. Fixtures generally remained in place. Computerized point-of-sale cash registers did not appear one day, but will brought on-line gradually during the next few years. In selected cases, AAFES and NAVRESSO merged package stores with existing shoppettes and convenience stores, while the Marine Corps exchange co-located a few of their package stores with post exchanges. No radical changes in these outlets' hours is in the offing either—they will be expanded or shortened based on patron demand.

All of the services' exchanges now offer their package store personnel retail and management training courses, with the most structured sessions run by the Navy Resale Career Academy. Similarly, the exchanges provide on-site assistance and "how-to" kits to managers that cover a broad range of management, personnel, display and general business suggestions.

In fact, the most noticeable change from the patrons' perspective, might be the AAFES outlets' new name. Beginning on March 25, the day this exchange assumed control of Army and Air Force package stores, it christened them Class Six. The other exchanges have not followed suit.

Not surprisingly, the aggregate changes have generated about as much

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Jim Ostroff is a Washington, DC-based correspondent who covers the White House and federal agencies.

controversy within the alcoholic beverage business as a Fourth of July picnic. But decisions by AAFES and NAVRESSO to institute package store planograms and MSAs are another matter again—both praised and questioned by the industry. Ironically, these devices, employed to control inventory, product shelf placement and to maximize profits, are standard within the civilian retail community with which these companies do most of their business.

Typical of planograms is the one being adopted by AAFES. "The idea is that if you have a 10,000-square-foot store, the plan tells you what the displays should look like and how many linear feet of shelving should be allocated to this table wine and that beer brand," said Maj. James Heaberg, the exchange service's spokesman. AAFES expects to have its Class Six planograms for CONUS stores completed by December, and for those overseas by March. Individual stores may use a draft version before then. "These plans are not necessarily mandatory for the stores," Heaberg added. NAVRESSO's planograms took effect in April, 18 months after it absorbed the Navy's

In Norfolk, the Spirits Shoppe is located next to the Navy Commissary, in line with the one-stop shopping philosophy.

SPIRITS
Commissary

The Transfer Challenge

The transfer of military package stores into the exchanges' bailiwick perhaps might not have occurred were it not for one man, who had neither retail nor military business experience: Dan Daniel, the late chairman of the House's Morale, Welfare and Recreation Panel.

Confronted with the realities of dwindling defense funds and charges of mismanagement by MWR program officials, the Virginia representative, by the mid-1980s, warned the services they must run their leisure-time operations more like profit-oriented businesses, or face the possible elimination of these cherished programs. Even as federal MWR funding began to shrink (from $1.40 billion in fiscal 1986 to $1.25 billion today), Daniel demanded the services find ways to offset reduced funding by relying more heavily on the exchanges, whose profits support a large portion of the operations of clubs, bowling alleys, and the like. Since Daniel's death last year, his successor as Panel chairman, Rep. Marvin Leath (D-TX), has been equally vociferous in hectoring MWR managers to be more businesslike.

With the handwriting on the wall, the Army in 1986 launched a task force on improving MWR management, focusing on the benefits of transferring its package store operations to the Army and Air Force Exchange Service and how to implement this. Whatever might have been the Army's intentions, the Panel, in spring 1988, ordered AAFES to take over its constituent services' package store operations before the end of fiscal 1989.

This was effected on March 25 and AAFES now manages 374 package stores worldwide, which it renamed Class Six. The Marine Corps exchange began phasing in its takeover of 35 package stores in 1988, a process that should be completed by year's end. The Navy Resale and Services Support Office took over 108 package stores from the Navy Military Personnel Command in October 1987.

"While the Navy has reported favorable results, it's still too early to say whether AAFES is meeting the goals it set out for the transition and daily operations," said a Capitol Hill source familiar with the matter. "From what we've seen, though, the exchange put together a good transition plan and the actual transfer was orderly. It occurred worldwide on the same day and supplies were not disrupted to any degree," said the official, who requested anonymity. For AAFES, whose package stores generate more than twice the sales of the other two exchange services' C-6 stores combined, the transfer at first appeared like a daunting task.

"At the outset, one of our biggest challenges was how to make 374 stores, each with their own stock assortment, own source suppliers and management, and work them into a centrally managed operation without reducing their customer support, or raising prices," said Maj. James Heaberg, a spokesman for the Dallas-based AAFES. "In addition, some of the facilities were well managed, well lit, where customer service was paramount, while other Class Six stores were located in pre-World War II huts hidden on the backside of the installations," Heaberg said. "Some of the stores bought their products from a central warehouse, while in other cases, stores in remote locations took deliveries off a truck and stored the products behind the managers' office. Prices," he added, "sometimes were different even though the stores were in the same geographic area."

Confronted with such disparities, the exchange established a task force in September 1988 that was given 120 days to develop a standardized plan for the stores' operations and procurement programs. Headed by Terry Blakeley on the marketing side and Rick Lyon, who handles procurement, the group established a central warehouse facility at Ft. Gillem, GA, from which all distilled spirits are distributed nationwide, developed planograms and Master Stock Assortments (MSAs) for the package system, but eschewed creating a store prototype. The task force also decided to proceed with the Army's plan to build or renovate 13 stores within the continental U.S. About 35 package stores overseas were merged into the exchange operation and they generally will be subject to the same type of operations-procurement changes implemented in CONUS stores.

However, in order to chart a future course for package store operations, the task force needed to analyze their past performance, which proved a task in itself. "When we did our initial surveys to determine what to expect from Class Six sales, we got incomplete information in some cases," Heaberg said. "For example, some locations didn't report their net income before depreciation. Information about sales, expenses and employees was incomplete." In certain package stores he said it was impossible to differentiate sales of beer from soda, or wine coolers, since they were lumped into a single product category. Consequently, Heaberg said the exchange now can only estimate its projected Class Six sales for this year—$322 million. (The year prior to the transfer, the Army and Air Force package stores did $290.4 million in aggregate sales.)

Meanwhile, as the transfer date approached, he noted, "some installations into which we went were completely sold out of inventory," a problem that he said was rectified with the industry's help. "Our distilled spirits and wine branch gave a lot of credit to the distillers who bent over backwards to help us fill in some of the [stores'] empty spaces," Heaberg said, adding the entire industry offered its assistance prior to and after to the transfer.

Initially, in March, he observed, "there was some confusion [among vendors], which comes from the fact that AAFES has been selling beer and wine coolers for a number of years through the convenience stores," but added that "a year from now you should pretty much be able to find a similar stock assortment in every package store." Industry officials generally give AAFES good marks for effectuating the package store transfer, but some minor kinks yet remain in the system, according to Peter Nelson, executive vice president, Asbach International Corp., Morris Plains, NJ. "Right now we're in an interim situation and some [vendors] don't know what's going on. Some stores buy their liquor from distributors and others from the AAFES warehouse," Nelson said. Bill Shewciw, military manager with Brown-Forman Beverage Co., Louisville, KY, maintained the centralized warehouse system is efficient and cost effective and noted his firm and others sought to assist exchange package store officials with shelf management and displays, "since we did realize that they weren't as knowledgeable about our industry as we had thought."

Nonetheless, Shewciw asserted his firm, which sells such products as Jack Daniels and Canadian Mist whiskeys, "views the entire military as a key account now where it wasn't before" and has created a new department to handle and promote these sales. "Drinking patterns are built between ages 21 and 28 and if [military patrons] start drinking our brands when they are in the service, they will continue to do so after leaving the service," he said.

Spokesmen for NAVRESSO and the Marine exchanges said their assumption of package store operations generally went smoothly and industry officials concur, with just a few minor reservations.

Yet for all of the laudatory remarks heaped on the collective package store transfer, the largest one may never have occurred, according to well informed sources on Capitol Hill and with AAFES. Even as the exchange system was preparing for a smooth transition in these stores' operations, some were seeking to scuttle it altogether.

"Congress directed us to take on this [package store] operation. We didn't ask for the job, for who would want to take on a declining business activity," said a high ranking AAFES official, who spoke with *Interservice* on the condition of anonymity. "Even though there were various studies [of package store operations] by the Army and the Orkand Corp.,—one that said all revenue-generating operations should be turned over to the exchange—there were some in the MWR community who felt, 'Today the package stores, tomorrow the snack bars and bowling alleys,'" the source said.

The AAFES official said petty jealousy also seems to have motivated opponents of the exchange system's takeover of Army and Air Force package stores. "Some have alleged that it's hard to believe that in Europe every AAFES inventory has always counted out right, saying, "Everyone knows that it has been losing money there for years," the source said. Consequently, the official said it was not surprising to learn that, "some in the MWR community were out to do anything they could to scuttle the [transfer], including illegal lobbying of Congress."

Well placed congressional sources confirmed this latter allegation, "but nothing really came of it," one official said. Apparently, the mini-insurrection was quelled not with guns, but with butter—in this case money. Base commanders, who receive the PX profits used to fund MWR activities, were guaranteed they would receive as much money as they had before the AAFES package store transfer, plus dividends from beer, wine and distilled spirits sales, based on a complex distribution formula. "Let's say the acceptance or rejection of any consolidation of the package stores with the exchange was directly related to this distribution formula," one knowledgeable congressional official said.

"Each base commander, in getting a dividend check directly from the PX, was more likely to accept a consolidation." ■

TOP: *Recipe and mixing ideas are provided by vendors and lead to increased sales.*

BOTTOM: *Displays equal more sales, as this one featuring mini size bottles shows.*

package stores.

AAFES's MSA, which will be inaugurated this month, covers 1,097 alcoholic beverage products; 646 for distilled spirits, 350 for wine and wine coolers and 101 for beers. It was not known at presstime how much leeway the stores will be given to carry optional alcoholic beverages. In the interim, though, the exchange established a 411-item MSA for distilled spirits stocked at its Ft. Gillem, GA, central warehouse, from which all stores must purchase their liquors. NAVRESSO's MSA, which covers about 1,280 wine and distilled spirit products, but no beer yet, took effect in April. Navy package store managers were instructed that this MSA should comprise at least 80 percent of their inventory. NAVRESSO established central warehouses at its various Field Support Offices around the country.

The Marine Corps exchange, meanwhile, has adopted a different tact to achieve better service and profits at its package stores. "Our general concept, if there is one, is to be ungeneral" in assuming control over the package stores, a process that began in 1988 and should be completed by year's end, said R. Lee Phillips, the Assistant Head of Retail Operations with the Marine Corps' MWR Support Activity.

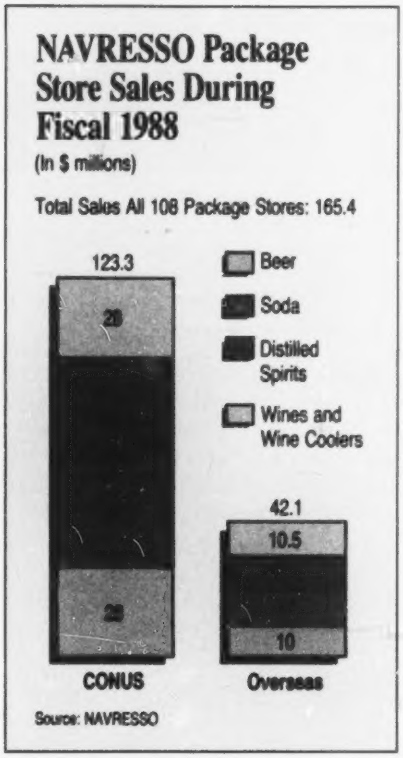
"We don't have any cookie cutter approach to store layout or stock assortments," nor has the Marine Corps exchanges created any central alcoholic beverage distribution warehouse, Phillips said. "Planograms? What for," he asked, adding "we don't believe in the idea of approved products" either at its 24 domestic and 11 overseas stores. "We simply don't agree with having an MSA. There are local (alcoholic beverage) preferences everywhere you go. Let's face it—tequila is much more in demand in Arizona or California than on the East Coast. Our approach is to have a greater brand selection and display space allocation for those products that have the greatest local appeal.

"Streamlining of inventories is a continuing process," Phillips said, asserting the service's exchange eschews mandatory approved listings. "We're saying that our managers are the experts; they know what their customers want. They should be looking continuously at the best and worst sellers and keeping their inventories and stock assortment clean."

Whatever the exchanges' methods for improving their package stores' performance, vendors generally applaud the effort and say they are looking for them to enhance their business as well. "The planograms are terrific because in the past package store products were displayed in a variety of ways," said Phillip Paonessa, vice president for control states and the military with Monsieur Henri Wines, Ltd. "Hopefully, the stores now will put products in a more respectable position, accentuating brands that are more popular and can turn a bigger profit for them, rather than an inexpensive one liked by the store manager," said Paonessa, whose White Plains, NY, firm sells imported varietal wines such as Premiat, Trakia, Duna and Weber. He added that adoption of planograms and MSAs would benefit sales of its Stolichnaya imported vodka, explaining, "It is extremely popular and would warrant a prominent position on store shelves."

Irving Sandler, sales director for national and international accounts with Schenley Affiliated Brands, Corp., Dallas, insists the MSAs are equitable to industry, noting that AAFES and NAVRESSO officials "are professionals who know what they're doing. They've given consideration to local popular brands as well as national ones," a concern, he said, for a company that sells leading brands such as Dewers White Label, Gordon's Gin and Gordon's Vodka, as well as Coronet Brandy and Crawford Scotch.

"Planograms definitely *will* affect our business, but in a beneficial way," maintained Julio De Arcos, Barcardi Imports, Inc.'s U.S. military sales manager, explaining, that "since shelf space will be allocated based on sales and our Barcardi Rum is the dominant brand,

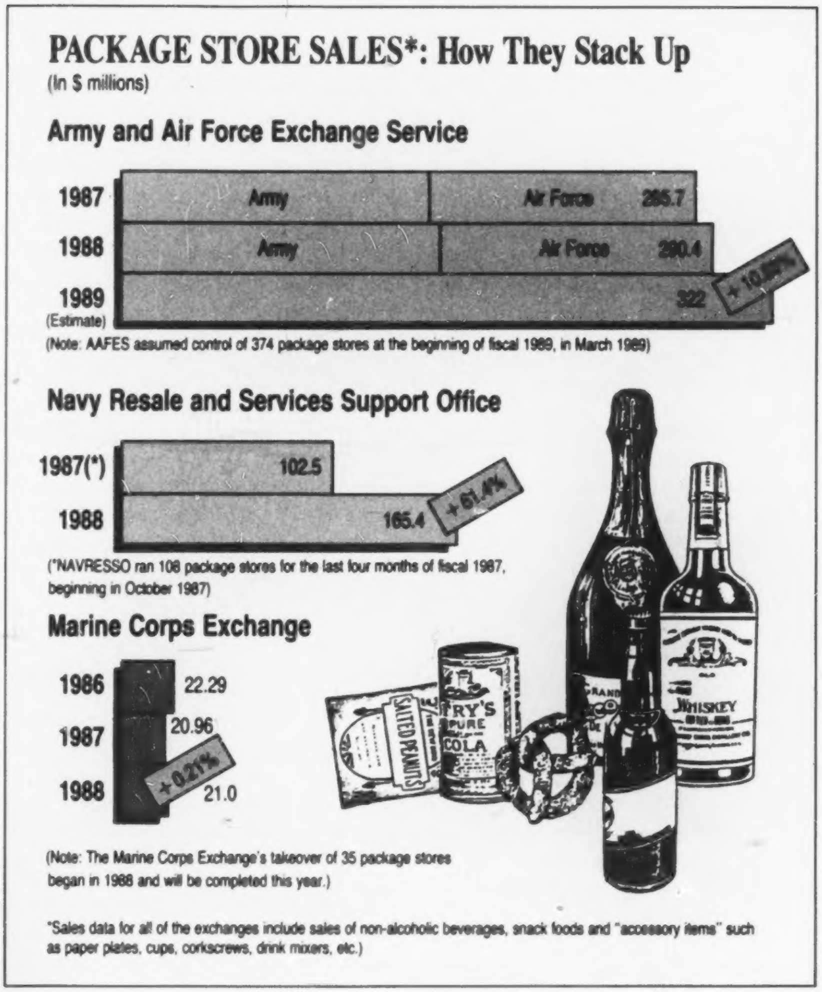


NAVRESSO Package Store Sales During Fiscal 1988

(In $ millions)

Total Sales All 108 Package Stores: 165.4

Source: NAVRESSO



PACKAGE STORE SALES*: How They Stack Up

(In $ millions)

Army and Air Force Exchange Service

(Note: AAFES assumed control of 374 package stores at the beginning of fiscal 1989, in March 1989)

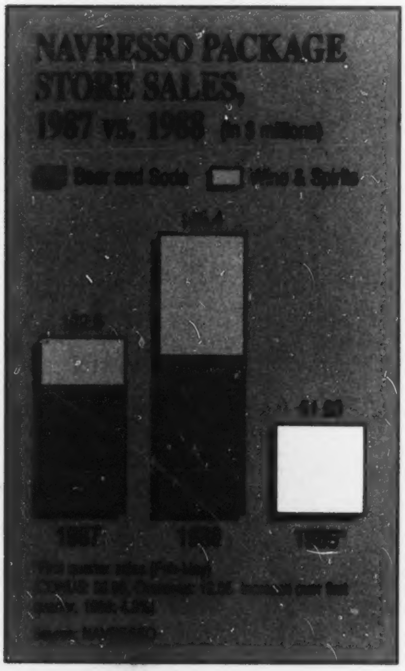
Navy Resale and Services Support Office

(*NAVRESSO ran 108 package stores for the last four months of fiscal 1987, beginning in October 1987)

Marine Corps Exchange

(Note: The Marine Corps Exchange's takeover of 35 package stores began in 1988 and will be completed this year.)

*Sales data for all of the exchanges include sales of non-alcoholic beverages, snack foods and "accessory items" such as paper plates, cups, corkscrews, drink mixers, etc.)



NAVRESSO PACKAGE STORE SALES, 1987 vs. 1988 (in $ millions)

[illegible]

we'll definitely come out ahead of the game." Moreover, De Arcos said the Miami-based company's brands, which also include Martini & Rossi dry vermouth "not only are excellent movers, but have a profitable price structure so they bring a high ticket item to the cash register."

McAuley, though, averred that companies should not look for their national market standing to be translated automatically into an identical amount of package store shelf space. "Our 40 percent share [of the national beer market] means we could have 60 percent in one region and 30 percent in another. So allocating 40 percent of the shelf space across the board wouldn't address customers' preferences and wouldn't permit the stores to take advantage of strong regional brands," he said. McAuley is a staunch advocate of MSAs, noting that "package stores typically carry 150 different packages of beer with the top 50 brands producing 90 percent of their sales. And while the remaining 100 packages take up 60 percent of the shelf space they produce only 10 percent of the sales."

Bill Shewciw, military manager with Brown-Forman Beverage Co., distiller of Jack Daniels, Canadian Mist, Early Times and Ushers, forecast the Louisville, KY firm will experience no market disruptions as a consequence of package stores rejiggering of their marketing plans, adding the company has provided assistance to the exchanges to help them formulate the planograms and MSAs.

As a practical matter, though, an executive with one of the nation's largest distillers said all companies should be prepared to sacrifice some of their brands as the price for doing business with the exchange-operated package stores. "As far as I'm concerned, if you have fast-moving brands they should be in these stores. If items are not selling well, it's not beneficial for the stores to carry them," said the official, who requested anonymity. "I know that we are going to lose a certain number of items, but I'm prepared to sacrifice these for our fast-moving items. Sure, if you have slow moving brands you should be concerned about [the exchanges package store takeover], because you could be out of business. That's business life today." Echoing these sentiments, an official with a large regional brewer, who also sought anonymity, said that while "store managers have some authority to select their own products, never forget the exchanges are in the same business as us—to make a buck, so of course they'll favor fast-moving brands."

"What's missing in this debate about how many packages a store should carry is recognition of 'the myth'," said an executive with one of the nation's premiere brewers. "The myth is that the military people travel all over the world and have a taste for all sorts of exotic imported beers. The truth is that all of these imports constitute less than six percent of these stores' sales," he said. "And the fact that these items sit in the stores is an indication they are not pleasing their customers."

Peter Nelson, executive vice president with Asbach International Corp., asserts this logic is specious. "People in the services have travelled abroad and have a greater awareness of [alcoholic beverages] than people who lived all their lives in, say, Oklahoma," said Nelson, whose Morris Plains, NJ, firm imports Asbach Uralt, a premium brandy, Monet Cognac and Apple Schnapps. "They want *more* from a package store than does a blue collar person," he said, expressing concern about MSAs, especially the draft AAFES version. "The industry feels that [AAFES's] 410 products might be a little slim an assortment to run a liquor store," Nelson said, expressing the hope that "once the distribution gets going they will look at additional items. We realize, of course, that it comes down to survival of the fittest."

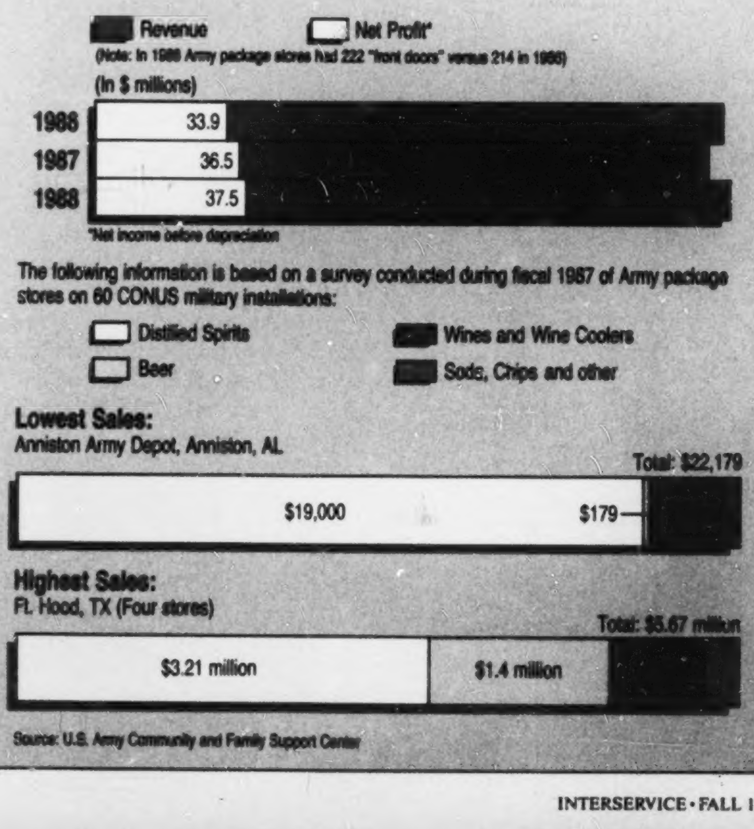
Even the fittest of firms, however, worry that the MSAs may contain a vital flaw. "We've always been concerned about whether the exchanges develop some mechanism whereby new products can be tested and marketed in the package stores," said Don L[illegible]yd, the Miller Brewing Company's international marketing manager. "While it's understandable from a management viewpoint that the stores want to limit their brand assortment," added Tom Waller, director of export sales with the Milwaukee firm, "we face a Catch-22 situation since new fledgling brands are our lifeblood."

But Robert Kornack, national military manager with Miller, the nation's number two-ranked brewer, asserted it is possible to sell the exchanges on new brands. "Since the package store managers do have some leeway in the brands they will carry, we would make a sales presentation to them, explaining the uniqueness of our new brand, the media support we will give it and pricing information," Kornack said. "We will talk about the POS support we will give it at the outlet and why it would be a good business decision to carry this brand."

AAFES's Heaberg asserted that all vendors "will get a fair shake" from the exchange as it formulates its MSA, citing Rick Lyon, its senior buyer for distilled spirits and wines, who stated, "Just because a manufacturer or distiller has a small line it doesn't mean they have slow sales."

On paper, at least, early indications are that this fair shake is benefiting the package stores. AAFES projected 1989 sales of $322 million would be nearly 11 percent more than those rung up by Army- and Air Force-run package stores the previous year. NAVRESSO stores posted a 61 percent sales increase between 1987 and 1988. Marine Corps package stores, which will not be fully under their exchange umbrella until December, posted a 0.2 percent sales increase during the same two-year period.

ARMY PACKAGE STORE SALES



Source: U.S. Army Community and Family Support Center

Yet some industry officials caution that one good year does not success make and fret that some of the services' own policies may ultimately thwart the transfers' principle goal—to make more money for MWR programs. Two cases in point, the Defense Department's directive that all services "deglamorize" alcoholic beverage consumption, and its prohibition against package stores advertising their products.

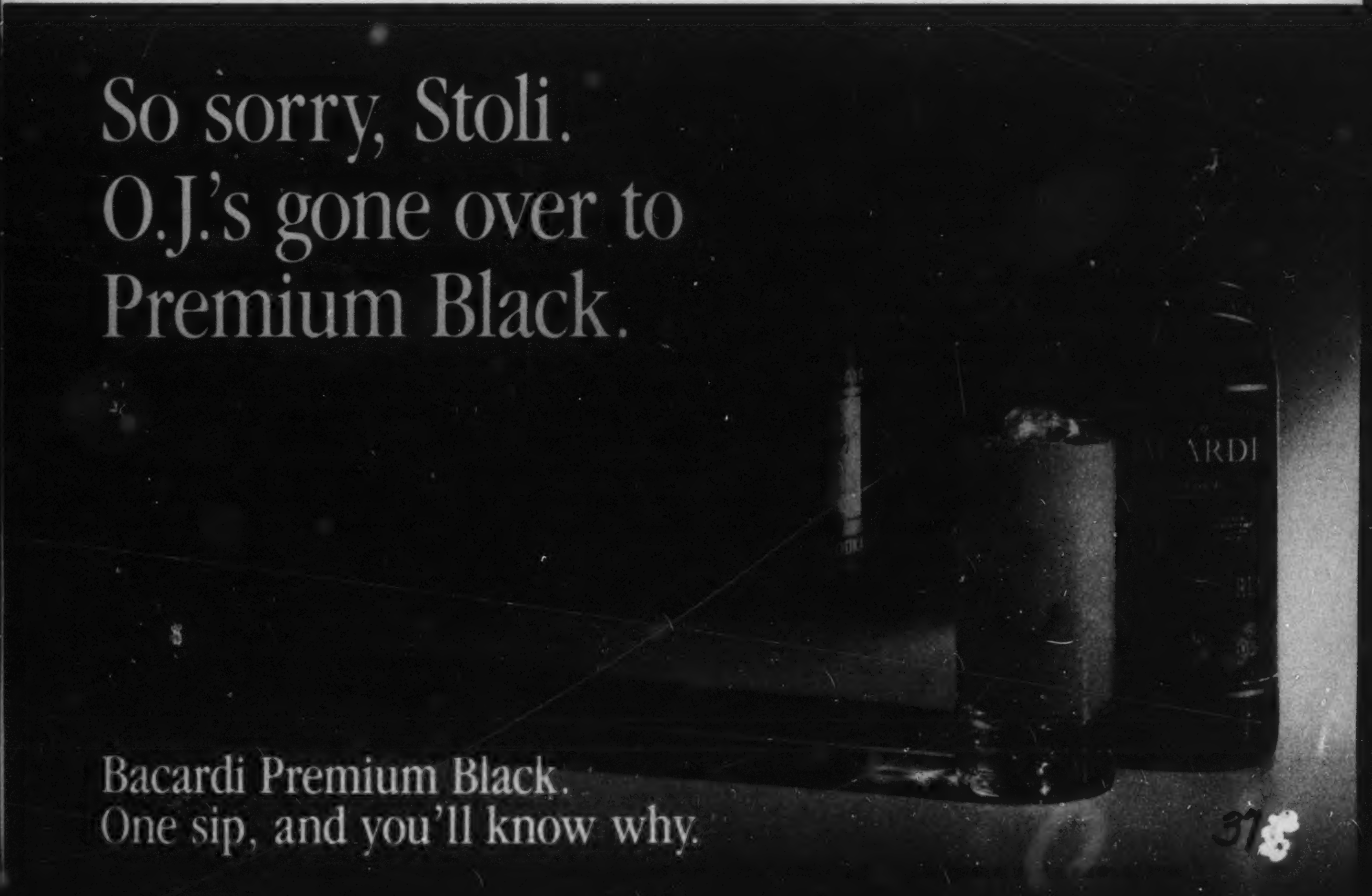
"We are all for efforts to reduce alcohol abuse, but the military has taken such a strong stand [against alcohol] that they are making it virtually unacceptable for people to be seen on base drinking beer. Consequently, they take more of their business off base," said an executive for a large national beer company, who asked not to be identified. "Then they think they can improve profits by increasing prices, which just makes civilian [alcoholic beverage] prices more appealing," he said. "So patrons buy off base and the package stores lose not only beer sales, but those of snacks and related items, too."

Given this situation, and the military's prohibition against package stores advertising on base, he maintained that "no one should be surprised that the military patron now is buying three or four times more beer off base than on."

This critic's position—voiced by other industry officials on the same "don't-identify-me" basis—is bolstered, albeit in a limited way, by AAFES's Heaberg. Recounting a trip to Carswell Air Force Base, TX, around Christmastime last year, before the transfer, he noted that, "even though it was payday, it was obvious that the [package] store was not doing a whole lot of business, primarily because they had priced themselves out of the market. My guess is that they were trying to make more on the markup to support MWR and do it on less volume, rather than doing [business] on high volume and low markups."

Asbach's Nelson, though, asserts that too much is being made of the military's anti-drinking campaign. "The [alcohol] control states, and even many non-control states, really are doing much of the same thing. This is just part of today's world and you have to make the best of it," he said. Monsieur Henri's Paonessa said the decline in military alcoholic consumption "has leveled off" recently, while Jack Blaisdell, vice president, international, with the Deerfield, IL-based Jim Beam Brands, Co., averred "the stores will make up for lost sales due to deglamorization of alcohol by stocking fast moving items."

The Marine exchanges' forthright



Phillips observes, "there's no question that with alcohol deglamorization sales are down" about six percent between 1986 and 1988. "We don't want to take non-drinkers and convert them to drinkers," he asserted. "Rather, our emphasis is making sure that our customers who do buy alcoholic beverages will do so on base." Acknowledging that DoD regulations prohibit the pricing of beer, wine and distilled spirits at less than 10 percent below the prevailing price charged by area civilian stores, he said the Marine exchange "will aggressively seek out special buys" and stress the better service offered by its knowledgeable sales staff.

In addition, the Marines are about to launch a new offensive, "by providing private label products for distilled spirits late this year and maybe wine later. Therefore our customers will be getting an excellent product at an excellent price," Phillips said. The other exchange services reportedly are considering introducing private label brands, too.

While this tactic may be some inducement for military patrons to buy more from their base package store, it is only a band-aid fix, counters a beer industry executive. "The real problem is that these stores often can't compete with area supermarkets, especially the big chain outlets, who are happy to sell beer as a loss leader. There's no way the military can compete with that," said the official, who requested anonymity. "One of the things that's most frustrating from our standpoint is that things move so slowly in the military. Even though we know for sure what it will take for them to beef up sales, they have their own restrictions. That is why the supermarkets are in a great spot right now to go out into markets that have military people and grab these people," he said. Maj. Gen. Jeffery Kahla, USAF, the AAFES commander since September 1988, "doesn't like people drawing attention to this. But the military has created its own monster and they have to change it or live with it."

Package stores can compete with supermarkets by beating them at their own game: in-store promotions and cross-merchandising.

AAFES's Heaberg acknowledges that some regulations may pose their share of challenges to the package store operator, noting for example, that civilian liquor and beer retailers often can advertise in installation newspapers, while managers "are prohibited from advertising outside the walls of their store. You can park a truck outside the building, but you can't say there is a truckload sale," he said. Yet Heaberg maintained the package stores can compete with supermarkets by beating them at their own game: in-store promotions and cross-merchandising. "Managers may use vendor-supplied promotional displays, as well as banners, shelf talkers and bottle toppers," he said, adding store managers also will place key accessory items, such as corkscrews, potato chips, glasses, paper plates, sodas and mixers, near alcoholic beverages. Civilian retailers for years have used cross-merchandising to bolster impulse sales and their profits.

But for AAFES, as the other services' exchanges, this technique has a broader goal. "Through our marketing, merchandising and pricing programs we are aiming to make the package store a one-stop party shop," Heaberg said, noting these stores' convenience will increase the probability that patrons will shop on base for their alcohol and party needs. Coors' Moses concurs that cross-merchandising in particular is the stores' best offense, "to keep their customers shopping on base."

Towards this same end, Phillips said the Marine exchanges also have relocated some of their package stores—"which sometimes were located in hard-to-find places on base"—into more accessible locations, and in March received DoD authorization to sell wines in convenience stores.

On balance, the exchanges' approach to civilian competition is realistic, said Monsieur Henri's Paonessa. "Because supermarkets may use [alcoholic beverage] sales as a loss leader you'll never be able to beat them on price 100 percent of the time, but with the exchanges' centralized buying, especially AAFES's warehouse operation, they can now do what they set out to do," he said. "They can offer the military patron the best *consistent* national price on alcoholic beverages, just like the exchanges have done over the years with clothes, colognes, or what have you."

NAVRESSO, meanwhile, is experimenting with a new program to take on the supermarkets directly. Its Jacksonville Field Support Office weekly surveys the alcoholic beverage prices of its civilian competitors and permits its package stores to match these prices by issuing in-store coupons. A large sign is used near the store entrance explaining the program and shelf-talkers indicate the current price discount. "The program costs very little, adds excitement, improves the store's image and helps us to remain competitive," Ken Freese, an FSO buyer, told industry representatives this past spring. The exchange's Orlando store reported its sale increased by $16,000 a week, with a total markdown of $850, using the couponing strategy. The exchange is studying the results of this pilot program and may extend it to all stores, according to a spokesman. The other exchanges have no plans to investigate couponing, though.

Jim Beam's Blaisdell believes "couponing has merit," albeit on a limited basis. "The basic situation remains because of the military's regulation that states that package store [alcoholic beverage] prices can be no lower than 10 percent below those in the surrounding area. If this regulation were waived completely," he said, "the stores would be free on a consistent basis to do exactly like people do on the outside—flexible pricing is a key sales tool." ■

From Franks to Film: Franchises & Concessions on Base

BY KATHY BOYLE

Mamiya RB67

First it was burgers. Today, it's Mexican, pizza and a host of other franchised businesses from candy stores to film developing services. In "Today's Army, Navy, Air Force and Marines," franchising is no longer a novelty, but a very lucrative way to do business. In truth, it is the military customer's strong demand for nationally known, brand name products—especially fast food—that drives the military's franchising business.

The military customer is delighted to have McDonald's, Burger King and Pizza Hut easily accessible on base. To go off base to receive the same nationally known products and services is a convenience today's sailor, soldier and airman would not easily forego.

Franchising has been so popular, in fact, that the military is following suit by creating its own imaginative, in-house franchising concepts and marketing them worldwide. These, too, are proving successful.

Fast Foods Grow

Today, the Navy alone has 67 fast food concessions in the continental U.S. and nine overseas, with another 15 planned for the near future. "We are trying to give the military customer the same brand names that they are familiar with off-base, yet more conveniently located for them," explains Maureen Murray, public affairs specialist with the Navy Resale and Services Support Office (NAVRESSO), Staten Island, NY. "In fiscal 1988, concession units did $135.5

Kathy Boyle is a Washington, DC-based freelance writer. She writes widely on retail subjects for several well-known national trade publications.

million in sales. McDonald's alone did $83.9 million and we received $9.1 million in commissions from that contract based on a percentage of sales," adds Murray. The way the proceeds are shared in concession agreements is what Murray terms "Revenue Sharing." In other words, each base gets its cut of sales. "This way they realize the importance of concession/franchising programs," explains Murray.

Concessions on base actually began in the early 1980s. At that time the Navy signed four regional contracts with Burger King to do business on base. Then, in 1984 NAVRESSO signed its first national concession contract with McDonald's, the latest opening in March 1989 in Subic Bay, Philippines. Currently, there are 38 McDonald's in CONUS and nine overseas. Two more McDonald's are scheduled for Bangor, WA and Kings Bay, GA in the near future.

"Our latest fast food franchising initiative is with Wendy's. We have signed a 10-year contract for up to 10 Wendy's overseas," tells Murray. The first Wendy's to open under this agreement was in Naples, Italy. "It opened in August 1988, and its August to December sales totaled $792,000," says Murray.

By the end of 1989, another Wendy's will open in Sigonella, Italy, with future units proposed for Rota, Spain and Keslavick, Iceland.

Beyond Burgers

Besides burgers, there are a number of other entrants into the military concession market—especially in the pizza market. As the world's largest pizza restaurant chain with more that 6,800 locations in 50 states and 51 foreign countries, it comes as no surprise that Pizza Hut is one of the early contenders. This past January, Pizza Hut opened a unit at Barber's Point, HI. "They were doing $3,200 a day when they opened," explains Murray of NAVRESSO. This is a full-sized, sit-down unit.

Over the past five years Pizza Hut has aggressively introduced new pizza products and new building concepts including kiosks and delivery. Additionally, it has kept pace with the rest of the pizza industry with discount strategies. At the same time, they have aggressively sought new overseas markets, recently opening two full-service restaurants in the Soviet Union. So the military initiative fits well into their growth strategy.

But, Hawaii is not the stopping point for pizza. In November 1988, the Navy opened a Pizza Inn unit in Yokosuka, Japan. "When the fleet was in, they were doing $10,000 a day," explains Murray of NAVRESSO. "On a regular day they did about $5,000 a day." In the near future, they will be adding home delivery to the Yokosuka unit to smooth out the peaks and valleys of sales.

"We are trying to give the military customer the same brand names that they are familiar with off-base, yet more conveniently located for them."

Regionally, the Navy has added a number of other concepts. "In April and May we added a Little Caesar's Pizza, a SUBWAY and a Popeye's in Pearl Harbor, HI. And, in June we added a Del Taco at 32nd Street Naval Station, San Diego, and a Pizza Hut at Great Lakes Training Station in Illinois. These operations are great for lunch break, especially at some isolated bases, where there is not time to drive off base to find a comparable restaurant," adds Murray. Currently, all the concessions are the full-style restaurant concept, each with its own separate dining space.

Meanwhile, NAVRESSO is looking at a proposed food court concept—with three or more dining establishments, probably a chicken, Mexican and Italian combination—sharing a common dining area. These are being scrutinized for both naval Training Station, Great Lakes, IL and 32nd Street Station, San Diego, CA. The details on these programs have yet to be worked out.

SUBWAY Makes Headway

SUBWAY opened its first military unit at Pearl Harbor in April 1989. "This is an upgraded unit with three eight-foot bays, compared to the usual SUBWAY unit which would have one eight-foot bay," explains Phil Tumminia, development agent for the State of Hawaii, Guam and Saipan for SUBWAY. "I think it may be the first SUBWAY with this large a format."

"We went with the larger format because we projected a higher volume, and so far, the gross is much higher. We have two ovens in the unit and they are both going all the time," adds Tumminia.

The unit is located across from where the ships pull in at Pearl Harbor. "We are currently into the summer tours, with a lot of turnover from sailors leaving for two-week summer tours to Korea and Japan. So, we are projecting even better business in the winter months."

"This store is doing three times the normal volume of any of my other SUBWAYs and probably seven times the national average," notes Tumminia, who has 25 units in Hawaii (five more scheduled to be open by December 1989.) He is currently negotiating with SUBWAY to do all units for the military in Korea, Okinawa, Philippines and Japan. "But," he adds, "before we look at new locations, we want to get a good foundation here [in Hawaii]."

Down the road, Tumminia is looking at delivery to the ships and offices in Pearl Harbor. He will shortly add a drive-thru to his current Pearl Harbor location. "Also, sometime in the 1990s we plan to utilize a SubBus," adds Tumminia. A SubBus is actually a self-contained vehicle the size of a mobile home which is a concession on wheels. "It will be a great thing here in Pearl Harbor since we can take it out to an aircraft carrier for those crew members who can't leave the ship, or to the Navy Shipyard or Supply Depot."

Tumminia is looking at four more possible locations on military bases in Hawaii, but is awaiting decisions from the proper military officials.

AAFES Expands

When AAFES contracted with Burger King in 1984, no one had any idea how successful the program would eventually be. In 1988, AAFES Burger Kings had sales of $163 million. The result of that success has been not only to encourage more Burger King business, but also to spur some truly imaginative in-house franchises—designed by AAFES itself.

After Burger King, AAFES took a long, hard look at its programs. "Historically, AAFES has tried to parallel some of the successful operations in the commercial sector," says Phil Latos, chief of the Food Branch. "Yet, if local management wanted to change an item or food product, it was the local prerogative. So you could have a pizza at one AAFES location one day and the next day order the same pizza at another location, and you would end up with two products that didn't resemble one another in taste or appearance. Whereas, if you have a Whopper at two different Burger Kings, they would both be the same. The product quality remained consistent, regardless of where it was purchased," said Latos.

The result: AAFES became convinced that to be successful with worldwide appetites, they had to standardize. What has happened since is its successful adoption of a string of AAFES-created franchises—Anthony's Pizza, Robin Hood Sandwich Shoppe & Deli, Frank's Franks, and most recently La Casa de Amigos. As AAFES has launched each of these concepts, they have made a strong and very successful commitment to consistency and standardization throughout the system. So no matter where a customer buys a Frank's Frank, the quality will be consistent.

"In rolling out our in-house concepts, we go through the time and trouble of doing a lot of market research," said Latos "And, we also rely heavily on input from the field. When we came out with Frank's Franks, we got together all the operators in CONUS, the Pacific and Europe and coupled them with all the research we had on the hot dog industry."

The first in-house concept AAFES rolled out was Anthony's Pizza, the World's Greatest. Prior to Anthony's Pizza, each restaurant had its own special way of making pizza. Based on research and product testing, AAFES designed a systemwide pizza product. "From that point on, everyone in the field started using the same ingredients, recipes and preparation method," says Latos. "And, they must meet strict guidelines before they can be licensed to operate under the Anthony's name.

AAFES did not forget a distinctive decor and design package for Anthony's to bring it to the attention of the customers, no matter where they are stationed in the world. All Anthony's have the same look, they have the same logo, design and product. To date, there are 80 open, primarily in the U.S., with 111 facilities planned to be in place by the end of 1989. The acceptance by the customer has been excellent, according to AAFES.

The Robin Hood concept is similar to Anthony's. It has a set decor package, reminiscent of old England, standardized equipment and a set menu. There are seven varieties of sandwiches, potato salad, cole slaw, dessert, cheese party trays, deli meats and cheeses sliced to order. A key element of the program is fresh baked bread. In the next two years, AAFES hopes to have over 100 of these restaurants in operation.

The third program, Frank's Franks, is a revamping of the AAFES hot dog program. The old AAFES hot dog program called for 21 different varieties of franks. Said Latos, "Out of the original number, we took the cream of the crop, ending up with seven basic franks and one Polish sausage. The reduced number makes the operation manageable, reduces inventory and makes it easier for the customer to order. The result is a much more serviceable and profitable operation."

Currently, there are only five licensed Frank's Franks facilities in operation. Within the next two years, AAFES expects 200 stores to be operating worldwide.

For Mexican food lovers, AAFES has opened three La Casa de Amigos. The first opened at Ft. Drum, NY, with the second at Maxwell AFB, AL, and the third at Ft. Bragg, NC. AAFES hopes to open over 100 of these within the next year.

In addition to these concepts, AAFES is developing an in-house chicken program called The Chicken Loft and another concept called Sweet Reflections, which will offer fresh baked goods, ice cream, frozen yogurt, gourmet coffee, and candy.

Candy Shops Grow

A number of gourmet candy retailers are moving onto military bases offering the military customer the best in chocolates at very attractive prices. Fanny Farmer Candy Shops Inc., the nation's largest candy retailer, headquartered in Cleveland, OH, manufactures and sells its premium-quality chocolates and candies in nearly 300 candy shops in 19 states. Besides its store locations, Fanny Farmer has also moved onto the military base.

In 1984, the company was bought by the French chocolate firm, Poulain Industries S.A., now called Midial. The move brought the necessary capital to rejuvenate the firm and lead it on a bold expansion program—including the military market. Through the introduction of new products, redesigned packaging, innovative store design and renovation, Fanny Farmer successfully achieved a corporate turnaround with record sales.

The company manufactures and sells boxed assortments, bulk and single candy items, truffles, nutmeats, fudge, and candy bars, as well as hard candy and non-chocolate specialty items. Recent introductions include Classic Truffles, the first truffle that uses no preservatives and requires no special refrigeration. In addition, Fanny Farmer offers a variety of seasonal and holiday gift items. Ice cream is available in 29 shops and fudge is made in 80 shops.

In 1988, Fanny Farmer had sales in excess of $53 million and produced more than seven million pounds of candy. Eighty-five percent of sales are from Fanny Farmer shops, with the remainder from department stores, military installations and other wholesale accounts.

Newer to the candy business, but just as aggressive, is Cathy's Candies. "Our candies are sold from 16x12 foot free-standing kiosks," say Cathy Roberts, creator of Cathy's Candies, whose company operates under the name of CARCO, Winston-Salem, NC. The units sell refrigerated fine chocolates as well as dry bulk candies such as coco buttons, candy peanuts, and gummy worms. Cathy's Candies also sell imported cookies and a line of sugar free, diet chocolates.

Items are retailed from an attractive, free-standing, three-sided kiosk. The design includes an inner counter work station area for cutting and boxing of candies.

"We are very happy with the reception we have received from the military customer," says Roberts. "The reception has been wonderful from the patron. And, I think they know they are saving a lot of money. For example, a truffle may cost $1.49 a piece downtown and the military customer can get it for 89¢ at one of our kiosks."

Roberts explains that she does samplings all the time. "Sampling and demos are the way to sell the product."

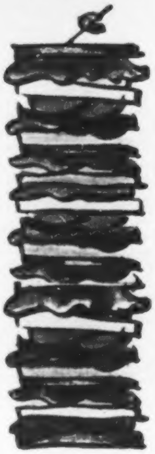
Location depends on the military base, yet Roberts notes the candy kiosks should be set in a very high traffic area. "We have to be in a high traffic area. Yet we are semi-restricted as to what bases we can be located on because of the space requirements for the kiosk."

Besides the line of chocolates and candies, Cathy's Candies also sells gift items. "We have a number of products we market at holiday time for gifts, such as Irish cream tortes, sparkling ciders and unusual gift ideas. We also do gift wrapping so the customer takes away a complete gift. Our holiday gift center is adjacent to but not in the candy store. It is usually a 12x12 foot area done in red and white with garland around the poles."

Typically, a unit has a full staff, including a manager and two employees. The units are usually open seven days a week.

Navy Fast Food Franchises*

McDonald's	47
Burger King	4
Wendy's	1
Pizza Inn	1
Pizza Hut	2
Popeye's	2
Little Caesar's	2
Subway	1
Del Taco	2
Taco Bell	4
Domino Pizza	1



Source: NAVRESSO
*As of July 1, 1989.

Cathy's Candies has three units open, with a fourth planned for Charleston Air Force Base. "Since they are costly investments, we want to do it right and get the unit rolling well, before moving onto another opening," says Roberts.

Film Processing

In addition to fast food and candy stores, the military offers a number of film processing options, most notably KODALUX brand name processing labs. "Currently, we handle 300 military exchange locations," explains Steve Pflum, director, Military Sales, for KODALUX Processing Services. Qualex, Inc. operates KODALUX Processing Services under a licenced agreement from the Eastman Kodak Co.

Military exchanges typically offer two to three levels of service—an economy service, the KODALUX service, and occasionally a mini-lab on the exchange store premises."Major exchanges have economy service and the premium branded product, like KODALUX," explains Pflum. "For our service we operate seven processing labs in the U.S.—Boston, MA; Dallas, TX; Fair Lawn, NJ; Findlay, OH; Palo Alto, CA; Rockville, MD; and Honolulu, HI."

"We think our business with the military resale system is doing well. In fact, we are very pleased, especially when considering that the photoprocessing business is more fractionalized today, with 1-hour labs and off-base competitors. But, we think the military resale price, 25 percent below suggested retail, is an uncommon value for military personnel."

Pflum notes that KODALUX has a separate promotion program just for the military exchange store, the most popular of these programs being the "Two for the Show" (two prints for the price of one). During this promotion, when customers leaves their film in a military exchange store, they automatically receive two prints from each negative and receive the second set free.

KODALUX Processing Services also offers a line of prepaid processing mailers available throughout most military stores. The military consumer can purchase a mailer to forward their exposed film to any one of six KODALUX laboratories. Within 24 hours the laboratory has the finished prints or slides shipped to whatever address the consumer wishes. The prepaid mailer system is especially convenient for today's highly mobile military personnel.

Approximately three years ago, AAFES began contracting for 1-hour photo service. At that time, a decision was made to provide the service at all exchanges where demographics would support the operation.

These mini-photo processing laboratories or "mini-labs" process a customer's roll of film within one hour. "Since these activities are usually located at the main shopping mall, customers can drop off their film, do other shopping and return in an hour and get their pictures back," explains James C. Sauers, chief, Operations Division, AAFES. The concession 1-hour mini-labs complement the photofinishing programs offered in the main retail store.

The 1-hour service is not a franchise, but rather a concession. "This service is operated by contract with individuals and business firms capable of providing the services requested. The contracts are established through full and free competition among all eligible sources interested in providing 1-hour photoprocessing services," explains Sauers. "Participation by small businesses and minority business enterprises is encouraged. Contracts are awarded by our exchange region purchasing branches.

"Although our program may not offer the military customer a recognizable national brand name, it will provide them with quality photoprocessing at a competitive price in comparison to typical off-installation commercial prices," he adds. "Brand name recognition isn't essential with this service. More important is the convenience of the mini-lab in the main shopping complex."

Acccording to Sauers, the photo concession operations are doing well. "Currently, we have 25 mini-labs in CONUS, Panama, Hawaii and Guam. Sales for fiscal year 1988 totaled $2.3 million, and we anticipate a substantial increase in sales for this fiscal year," he adds.

Others Poised to Enter

Other companies are poised to enter the military market as well. Concession Air and Sports Services, for instance, formed a separate operating company last year specifically to bid on military contract business. "We are known for our quality airport and stadium businesses," explains Paul Frascella of Nationwide Catering, Inc. in Orchard Park, NY. "Since 1915 we have served the sports and leisure business. The military is a segment of the industry we are extremely interested in developing. We feel there is a lot we can bring to the military market with our experience. In fact, over 230 million customers who go through the airports are served by Concession Air."

> *"Samples and demos are the way to sell the product."*

And now, Kentucky Fried Chicken is actively developing its military business through franchisees and expects its first on-base restaurants to open in early 1990. "As the biggest player in the chicken restaurant business, we think there is tremendous potential in military sales," said KFC Vice President Walt Simon. "We've received approval for units at Ft. Carson and Ft. Ord, and we're in the planning stages of several others."

What Next?

The military has seen the on base evolution from fast food frachisor alone to over a dozen fast food companies, along with candies and film developing. Will it be other lines of business such as franchised monogramming services or craft stores? Or, will it be a fast food outlet aboard ship? Whatever direction, franchisors are keeping a close watch on the military. Meanwhile, do not ignore that the military itself is coming up with its own imaginative franchise concepts. ■

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8TH ANNUAL
Exchange Sales Report

BY JULIE LEGG

FY 1988

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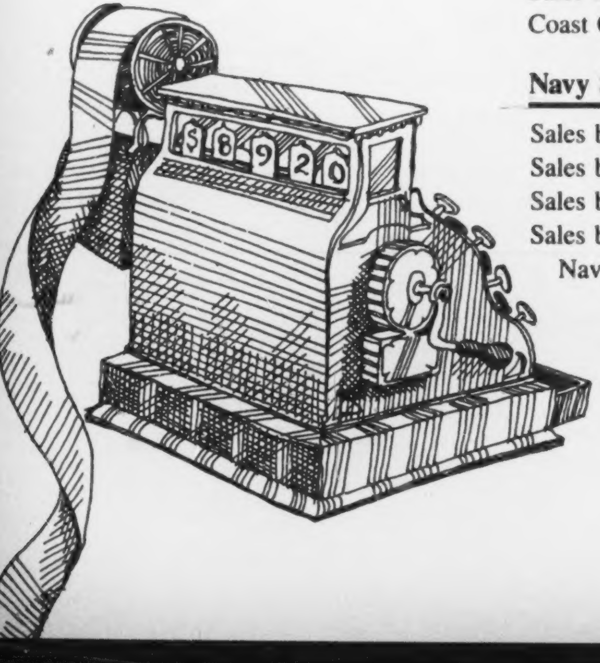

All-Service Exchange Total Sales Summary—FY88

AAFES Totals

	FY88 $Sales						
	Retail	Gasoline	Food	Services	Vending	Theaters	Total
CONUS	2,589,617,457	235,100,140	222,185,704	435,303,359	231,008,236	9,583,994	3,722,798,890
Overseas	2,176,803,039	150,712,035	319,528,530	374,629,994	66,945,695	18,641,453	3,107,260,746
Worldwide	$4,766,420,496	$385,812,175	$541,714,234	$809,933,353	$297,953,931	$28,225,447	$6,830,059,636

Coast Guard Totals

	FY88 $Sales			Total $ Sales FY87	Total Sales % Change 88 vs 87
	Retail	Services & Other	Total		
CONUS	78,472,927	7,364,741	85,837,668	83,354,717	3.0
Overseas	19,447,209	3,827,746	23,274,955	22,980,677	1.3
Coast Guard Cutters	226,682	74,316	300,998	315,884	–4.7
Worldwide	$98,146,818	$11,266,803	$109,413,621	$106,651,278	2.6%

Navy Totals

	FY88 $Sales				Total $ Sales FY87	Total Sales % Change 88 vs 87
Navy	Retail	Services	Concession	Total		
CONUS	900,287,388	283,789,616	99,794,052	1,283,871,056	1,220,070,826	5.2
Overseas	420,605,552	102,051,179	35,320,068	557,976,799	518,344,428	7.6
Worldwide	$1,320,892,940	$385,840,795	$135,114,120	$1,841,847,855	$1,738,415,254	5.9%

Marine Corps Totals

	FY88 $Sales			Total $ Sales FY87	Total Sales % Change 88 vs 87
	Direct	Indirect	Total		
CONUS	338,077,138	39,463,828	377,540,966	362,376,757	4.2
Overseas	52,636,027	10,497,754	63,133,781	62,706,574	0.7
Worldwide Totals	$390,713,165	$49,961,582	$440,674,747	$425,083,331	3.7%

Sources: *Interservice* is indebted to the Army and Air Force Exchange Service (AAFES), Navy Resale and Services Support Office (NAVRESSO), Marine Corps MWR Support Activity Retail Branch (MWRSPTACT), and U.S. Coast Guard Exchange and Morale Division for their cooperation and assistance with providing the data necessary for this report.

Note: Exchange sales for FY88 are preliminary and unaudited.

AAFES Worldwide Direct Sales By Activity
(FY88)

Retail ($ in Millions)

Activity Description	Sales	% Total
Main Store	2,727.8	56.72
Branch Retail Store	487.9	10.14
Specialized Retail Store	820.4	17.06
Automotive Sales, Service & Repair	484.9	10.08
Shoppettes	224.8	4.68
Concession (Exchange Mdse)	0.0	0.00
Miscellaneous	63.5	1.32
Total Retail	**$4,809.3**	**100.00%**

Food ($ in Millions)

Activity Description	Sales	% Total
Cafeteria I	180.6	14.84
Cafeteria II	104.8	19.31
Cafeteria III	98.3	18.11
Food Franchises	164.0	30.21
Mobile Snack Bar	18.3	3.39
School-Lunch Feeding Program	13.6	2.51
Snack Stand	22.3	4.11
Delicatessen	16.4	3.03
Ice Cream Stores	19.8	3.64
Miscellaneous	4.6	0.85
Total Food	**$642.7**	**100.00%**

Vending ($ in Millions)

Activity Description	Sales	% Total
Consumable Products Machines	131.1	90.78
Nonconsumable Products Machines	0.0	0.02
Service Vending Machines	0.2	0.11
Coin Operated Car Wash Service	0.2	0.16
Random Washer & Dryer Machines	0.0	0.00
Launderette Service	4.8	3.30
Jukebox & Wallbox	1.5	1.07
Other Amusement/Games Machines	7.1	4.92
Pay Telephones	0.0	0.00
Miscellaneous	–0.5	–0.36
Total Vending	**$144.4**	**100.00%**

Note: Totals may not add due to rounding.

Services ($ in Millions)

Activity Description	Sales	% Total
Bus or Taxi Service	0.3	0.49
Barber Shop (Direct)	0.1	0.21
Barber Shop (Concession)	0.0	0.21
Beauty Shop	0.3	0.47
Custom Tailoring	0.0	0.00
Laundry/Dry-Cleaning Services	0.0	0.05
Alterations (Direct)	0.0	0.00
Alterations (Concession)	0.0	0.00
Shoe Repair Services	0.0	0.00
Appliance Repair	0.2	0.35
Watch Repair Service	0.0	0.00
Optical Service	0.0	0.00
Photo, Portrait, Unit Photography, Painting & Sketching	0.0	0.00
Flower Shop	0.0	0.00
Rental Service	2.2	3.42
Customer-Owned Film Processing	0.0	0.00
Specialty Services	0.0	0.00
Recreation Type Services	0.0	0.01
Money Orders & Travelers' Checks	0.0	0.00
Service Pick-Up-Point (Direct)	4.6	7.27
Telegraph Service (except floral service)	0.0	0.00
Tailor-Made/Made-to-Measure Military Uniforms	0.0	0.00
Delivery Services	1.1	1.71
Hunting & Fishing License Sales	0.0	0.00
Domestic Services	0.0	0.00
Book & Periodical Sales	0.0	0.00
Movie Theater-Paid Admission	28.2	44.78
Vendor Catalog Sales & Ordering Service (Overseas & Offshore)	0.0	0.00
Mail-a-Gift Service	0.0	0.00
Service Pick-Up-Point (Concession)	25.3	40.14
Miscellaneous	0.7	1.08
Total Services	**$63.0**	**100.00%**

Exchange Store Census

This table provides a geographic breakdown of the number of military exchange stores in operation and reporting sales as of July 31, 1989. Included are both main and branch stores.

	Worldwide
Total DoD	**457**
Army & Air Force (AAFES)	247
Navy	135
Coast Guard	57
Marine Corps	18
	CONUS
Total DoD	**318**
Army & Air Force (AAFES)	162
Navy	98
Coast Guard	44
Marine Corps	14
	Overseas
Total DoD	**139**
Army & Air Force (AAFES)	85
Navy	37
Coast Guard	13
Marine Corps	4

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AAFES Exchange Coupon Redemptions

(FY88)

CONUS Regions	Number	% of CONUS	% of Worldwide	$ Value	% of CONUS	% of Worldwide
Alamo	1,617,432	21	19	1,196,900	20	18
Capital	3,604,888	47	42	2,743,393	46	41
Golden Gate	949,535	12	11	836,632	14	13
Southeast	1,488,085	19	17	1,160,707	20	18
CONUS Totals	**7,659,940**	**100%**	**90%**	**$5,937,632**	**100%**	**90%**

Overseas Region	Number	% of CONUS	% of Worldwide	$ Value	% of CONUS	% of Worldwide
Europe	389,662	44	4	325,866	47	5
Pacific	503,158	56	6	360,914	53	5
Overseas Totals	**892,820**	**100%**	**10%**	**$686,780**	**100%**	**10%**
Worldwide Totals	**8,552,760**			**$6,624,412**		

Note: Totals may not add due to rounding.

Geographic Sales Summary

(FY88)

($ in Millions)

Category	CONUS	Overseas	Mail Order	Worldwide
Retail	2,756.6	2,013.6	39.0	4,809.1
Food	235.4	307.3	0.0	542.7
Services	11.5	51.8	0.0	63.3
Vending	68.5	75.8	0.0	144.4
Subtotal	**$3,072.0**	**$2,448.5**	**$39.0**	**$5,559.5**
Concessions	397.5	237.7	0.0	635.2
Total	**$3,469.5**	**$2,686.2**	**$39.0**	**$6,194.7**

Note: Totals may not add due to rounding.

Sales Summary by Exchange Region

(FY88)

($ in Millions)

CONUS	Retail Net Sales	Food Net Sales	Services Net Sales	Vending Sales	Total Net Sales	Concession Sales	Combined Sales
Alamo	698.1	63.0	2.5	16.8	780.4	115.0	895.4
Capital	696.5	46.9	2.6	16.8	762.8	99.4	862.2
Golden Gate	676.5	65.7	2.5	14.9	759.6	88.2	847.8
Southeast	685.2	59.9	3.8	20.2	769.1	94.8	863.9
HQ Activities	0.1	0.0	0.0	0.0	0.1	0.0	0.1
CONUS Total	**$2,756.4**	**$235.5**	**$11.4**	**$68.7**	**$3,072.0**	**$397.4**	**$3,469.4**

Overseas	Retail Net Sales	Food Net Sales	Services Net Sales	Vending Sales	Total Net Sales	Concession Sales	Combined Sales
AAFES-Europe	1,439.5	193.0	44.1	50.7	1,727.3	133.2	1,860.6
AAFES-Pacific	574.0	114.3	7.7	25.1	721.1	104.4	825.5
Overseas Total	**$2,013.5**	**$307.3**	**$51.8**	**$75.8**	**$2,448.4**	**$237.6**	**$2,686.0**
Worldwide Total	**$4,769.9**	**$542.8**	**$63.2**	**$144.5**	**$5,520.4**	**$635.0**	**$6,155.4**

Note: Totals may not add due to rounding.

AAFES CONUS EXCHANGE REGIONS

GGER—GOLDEN GATE EXCHANGE REGION

HEADQUARTERS — SAN FRANCISCO, CA

1. Northwest Area Exchange (NWAX)
2. Central California Area Exchange (CCAX)
3. Southern California Area Exchange (SCAX)
4. Arizona Area Exchange (ARAX)
5. Rocky Mountain Area Exchange (RMAX)
6. Alaska Area Exchange (AKAX)

ALER—ALAMO EXCHANGE REGION

HEADQUARTERS — SAN ANTONIO, TX

7. Southwest Area Exchange (SWAX)
8. Central Texas Area Exchange (CTAX)
9. South Texas Area Exchange (STAX)
10. Red River Area Exchange (RRAX
11. Central Area Exchange (CEAX)
12. North Central Area Exchange (NOAX)

CPER—CAPITAL EXCHANGE REGION

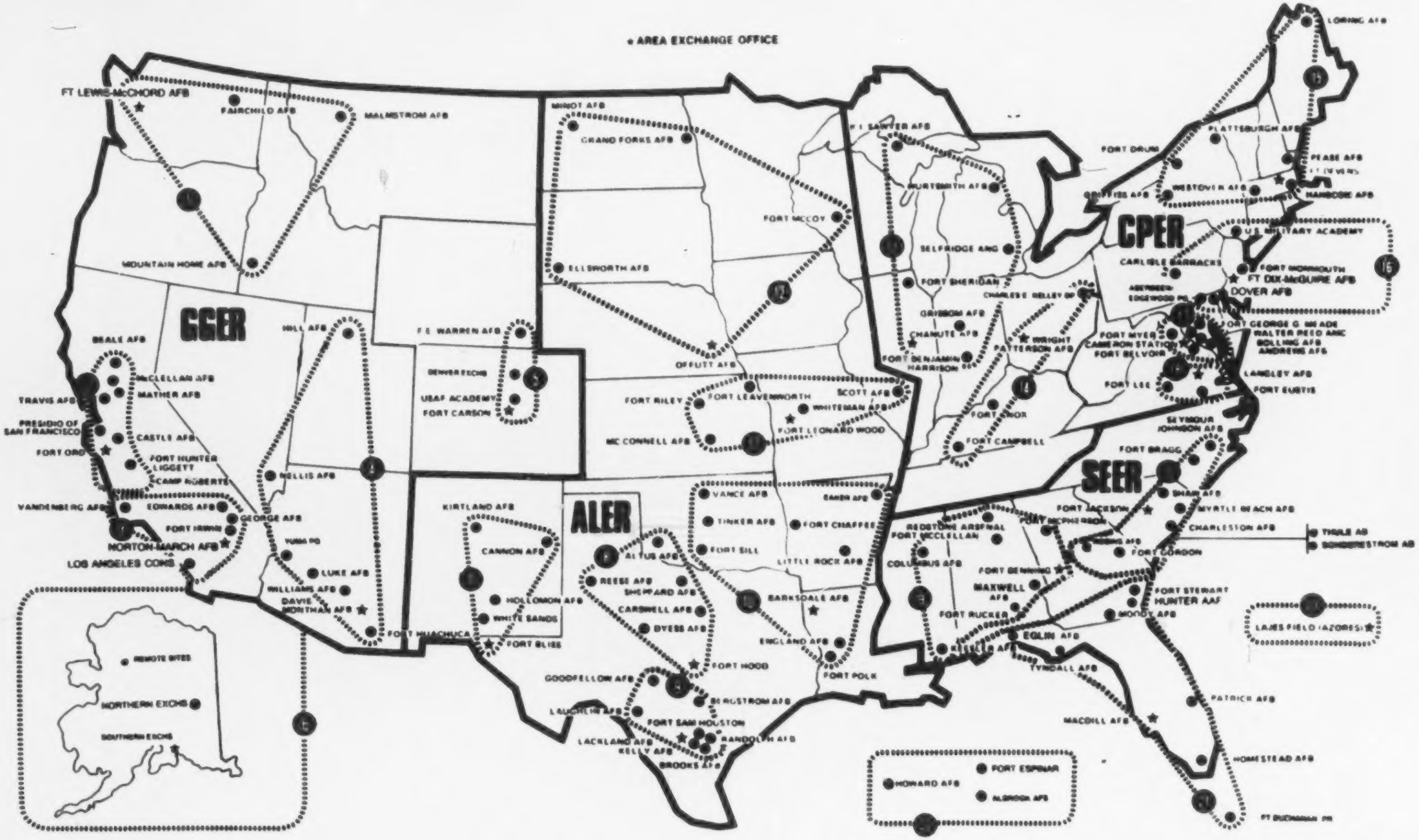
HEADQUARTERS — CHARLESTOWN, IN

13. Great Lakes Area Exchange (GLAX)
14. Midwest Area Exchange (MWAX)
15. New England Area Exchange (NEAX)
16. Mid-Atlantic Area Exchange (MAAX)
17. Washington Area Exchange (DCAX)
18. Tidewater Area Exchange (TDAX)

SEER—SOUTHEAST EXCHANGE REGION

HEADQUARTERS — MONTGOMERY, AL

19. West Georgia Area Exchange (WGAX)
20. Piedmont Area Exchange (PIAX)
21. Florida Area Exchange (FLAX)
22. Panama Area Exchange (PAAX)
23. Azores Area Exchange (AZAX)


★ AREA EXCHANGE OFFICE
GGER
ALER
CPER
SEER
FT LEWIS-McCHORD AFB
FAIRCHILD AFB
MALMSTROM AFB
MOUNTAIN HOME AFB
BEALE AFB
McCLELLAN AFB
MATHER AFB
TRAVIS AFB
PRESIDIO OF SAN FRANCISCO
CASTLE AFB
FORT ORD
FORT HUNTER LIGGETT
CAMP ROBERTS
VANDENBERG AFB
EDWARDS AFB
GEORGE AFB
FORT IRWIN
NORTON-MARCH AFB
LOS ANGELES COMS
HILL AFB
NELLIS AFB
YUMA PG
LUKE AFB
WILLIAMS AFB
DAVIS MONTHAN AFB
FORT HUACHUCA
REMOTE SITES
NORTHERN EXCHS
SOUTHERN EXCHS
F.E. WARREN AFB
DENVER EXCHS
USAF ACADEMY
FORT CARSON
KIRTLAND AFB
CANNON AFB
HOLLOMON AFB
WHITE SANDS
FORT BLISS
MINOT AFB
GRAND FORKS AFB
ELLSWORTH AFB
FORT MCCOY
OFFUTT AFB
FORT RILEY
FORT LEAVENWORTH
SCOTT AFB
WHITEMAN AFB
FORT LEONARD WOOD
MC CONNELL AFB
VANCE AFB
TINKER AFB
FORT SILL
FORT CHAFFEE
LITTLE ROCK AFB
ALTUS AFB
REESE AFB
SHEPPARD AFB
CARSWELL AFB
DYESS AFB
BARKSDALE AFB
ENGLAND AFB
FORT POLK
FORT HOOD
GOODFELLOW AFB
BERGSTROM AFB
LAUGHLIN AFB
FORT SAM HOUSTON
LACKLAND AFB
KELLY AFB
RANDOLPH AFB
BROOKS AFB
K.I. SAWYER AFB
WURTSMITH AFB
SELFRIDGE ANG
FORT SHERIDAN
GRISSOM AFB
CHANUTE AFB
FORT BENJAMIN HARRISON
CHARLES E. KELLEY SP
WRIGHT PATTERSON AFB
FORT KNOX
FORT CAMPBELL
LORING AFB
PLATTSBURGH AFB
FORT DRUM
PEASE AFB
FT DEVENS
GRIFFISS AFB
WESTOVER AFB
HANSCOM AFB
U.S. MILITARY ACADEMY
CARLISLE BARRACKS
FORT MONMOUTH
FT DIX-McGUIRE AFB
DOVER AFB
ABERDEEN-EDGEWOOD PG
FORT GEORGE G. MEADE
WALTER REED AMC
BOLLING AFB
ANDREWS AFB
FORT MYER
CAMERON STATION
FORT BELVOIR
FORT LEE
LANGLEY AFB
FORT EUSTIS
SEYMOUR JOHNSON AFB
FORT BRAGG
SHAW AFB
MYRTLE BEACH AFB
FORT JACKSON
FORT MCPHERSON
CHARLESTON AFB
THULE AB
SONDRESTROM AB
REDSTONE ARSENAL
FORT MCCLELLAN
COLUMBUS AFB
FORT GORDON
FORT BENNING
MAXWELL AFB
FORT STEWART
HUNTER AAF
FORT RUCKER
MOODY AFB
EGLIN AFB
TYNDALL AFB
LAJES FIELD (AZORES)
PATRICK AFB
MACDILL AFB
HOMESTEAD AFB
FT BUCHANAN PR
FORT ESPINAR
HOWARD AFB
ALBROOK AFS
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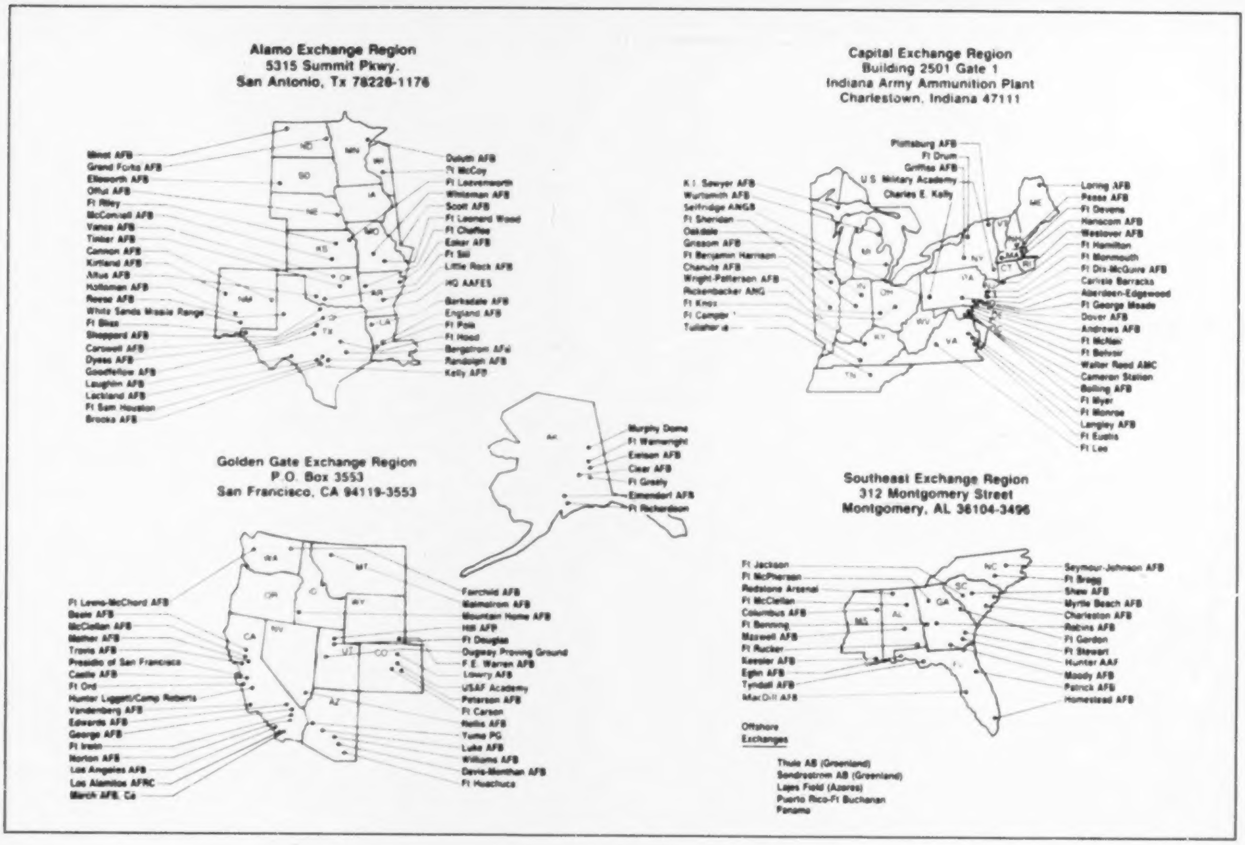
OPR: PL (2373)



Alamo Exchange Region
5315 Summit Pkwy.
San Antonio, Tx 78228-1176

Capital Exchange Region
Building 2501 Gate 1
Indiana Army Ammunition Plant
Charlestown, Indiana 47111

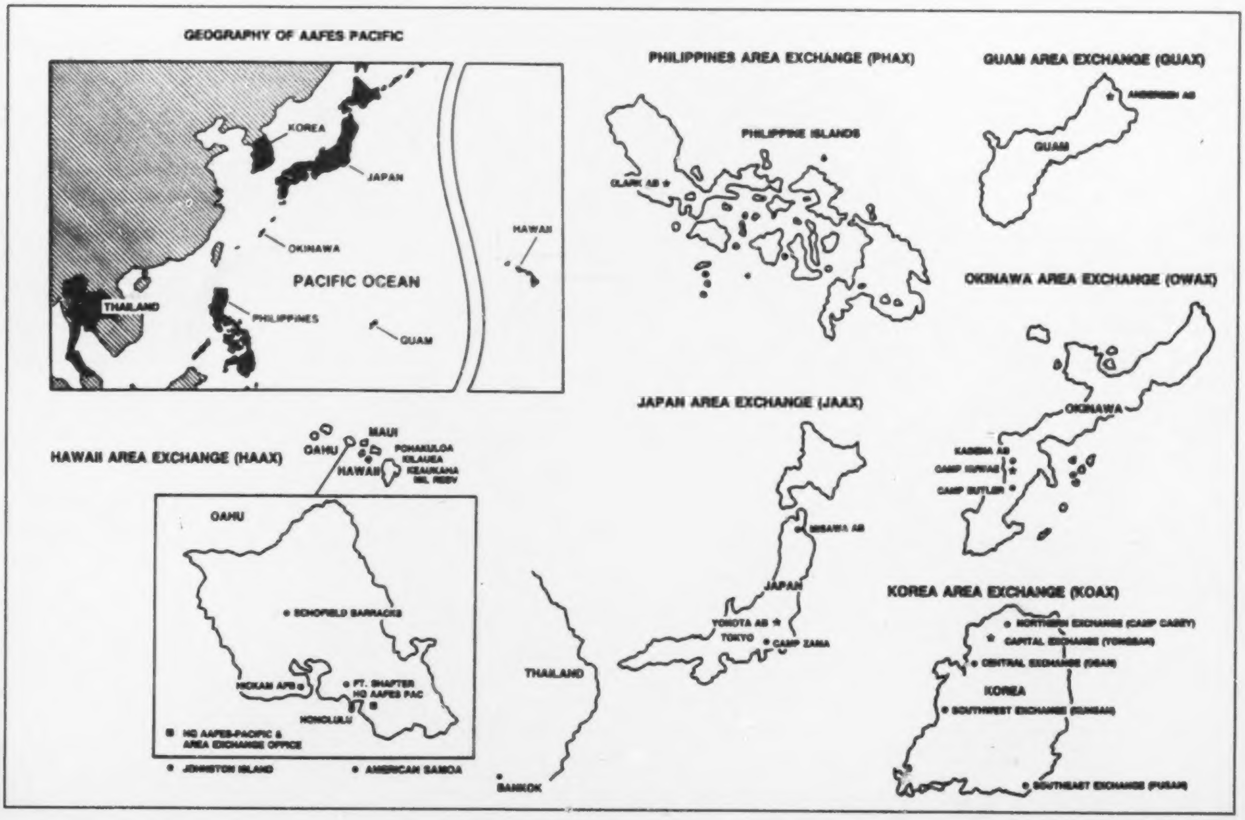
Golden Gate Exchange Region
P.O. Box 3553
San Francisco, CA 94119-3553

Southeast Exchange Region
312 Montgomery Street
Montgomery, AL 36104-3496

Offshore Exchanges

Thule AB (Greenland)
Sondrestrom AB (Greenland)
Lajes Field (Azores)
Puerto Rico-Ft Buchanan
Panama

Minot AFB
Grand Forks AFB
Ellsworth AFB
Offut AFB
Ft Riley
McConnell AFB
Vance AFB
Tinker AFB
Cannon AFB
Kirtland AFB
Altus AFB
Holloman AFB
Reese AFB
White Sands Missile Range
Ft Bliss
Sheppard AFB
Carswell AFB
Dyess AFB
Goodfellow AFB
Laughlin AFB
Lackland AFB
Ft Sam Houston
Brooks AFB
Duluth AFB
Ft McCoy
Ft Leavenworth
Whiteman AFB
Scott AFB
Ft Leonard Wood
Ft Chaffee
Eaker AFB
Ft Sill
Little Rock AFB
HQ AAFES
Barksdale AFB
England AFB
Ft Polk
Ft Hood
Bergstrom AFB
Randolph AFB
Kelly AFB
ND
MN
WI
SD
IA
NE
MO
KS
OK
AR
NM
TX
LA
Plattsburg AFB
Ft Drum
Griffiss AFB
U.S. Military Academy
Charles E. Kelly
K.I. Sawyer AFB
Wurtsmith AFB
Selfridge ANGB
Ft Sheridan
Oakdale
Grissom AFB
Ft Benjamin Harrison
Chanute AFB
Wright-Patterson AFB
Rickenbacker ANG
Ft Knox
Ft Campbell
Tullahoma
Loring AFB
Pease AFB
Ft Devens
Hanscom AFB
Westover AFB
Ft Hamilton
Ft Monmouth
Ft Dix-McGuire AFB
Carlisle Barracks
Aberdeen-Edgewood
Ft George Meade
Dover AFB
Andrews AFB
Ft McNair
Ft Belvoir
Walter Reed AMC
Cameron Station
Bolling AFB
Ft Myer
Ft Monroe
Langley AFB
Ft Eustis
Ft Lee
MI
ME
VT
NY
MA
CT
RI
PA
IN
OH
WV
KY
VA
TN
AK
Murphy Dome
Ft Wainwright
Eielson AFB
Clear AFB
Ft Greely
Elmendorf AFB
Ft Richardson
Ft Lewis-McChord AFB
Beale AFB
McClellan AFB
Mather AFB
Travis AFB
Presidio of San Francisco
Castle AFB
Ft Ord
Hunter Liggett/Camp Roberts
Vandenberg AFB
Edwards AFB
George AFB
Ft Irwin
Norton AFB
Los Angeles AFB
Los Alamitos AFRC
March AFB, Ca
Fairchild AFB
Malmstrom AFB
Mountain Home AFB
Hill AFB
Ft Douglas
Dugway Proving Ground
F.E. Warren AFB
Lowry AFB
USAF Academy
Peterson AFB
Ft Carson
Nellis AFB
Yuma PG
Luke AFB
Williams AFB
Davis-Monthan AFB
Ft Huachuca
WA
MT
OR
ID
WY
CA
NV
UT
CO
AZ
Ft Jackson
Ft McPherson
Redstone Arsenal
Ft McClellan
Columbus AFB
Ft Benning
Maxwell AFB
Ft Rucker
Keesler AFB
Eglin AFB
Tyndall AFB
MacDill AFB
Seymour-Johnson AFB
Ft Bragg
Shaw AFB
Myrtle Beach AFB
Charleston AFB
Robins AFB
Ft Gordon
Ft Stewart
Hunter AAF
Moody AFB
Patrick AFB
Homestead AFB
NC
SC
GA
AL
MS
FL



GEOGRAPHY OF AAFES PACIFIC

PHILIPPINES AREA EXCHANGE (PHAX)

GUAM AREA EXCHANGE (GUAX)

OKINAWA AREA EXCHANGE (OWAX)

JAPAN AREA EXCHANGE (JAAX)

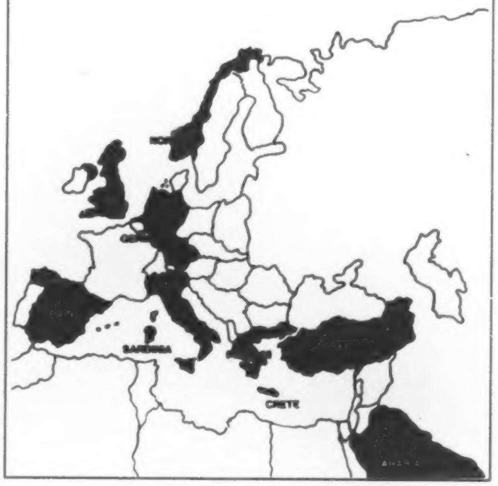
HAWAII AREA EXCHANGE (HAAX)

KOREA AREA EXCHANGE (KOAX)

KOREA
JAPAN
OKINAWA
HAWAII
PACIFIC OCEAN
THAILAND
PHILIPPINES
GUAM
PHILIPPINE ISLANDS
CLARK AB
ANDERSEN AB
GUAM
OKINAWA
KADENA AB
CAMP KUWAE
CAMP BUTLER
MISAWA AB
JAPAN
YOKOTA AB
TOKYO
CAMP ZAMA
MAUI
OAHU
HAWAII
POHAKULOA
KILAUEA
KEAUKAHA
MIL RESV
OAHU
SCHOFIELD BARRACKS
HICKAM AFB
FT. SHAFTER
HQ AAFES PAC
HONOLULU
HQ AAFES-PACIFIC &
AREA EXCHANGE OFFICE
JOHNSTON ISLAND
AMERICAN SAMOA
THAILAND
BANKOK
NORTHERN EXCHANGE (CAMP CASEY)
CAPITAL EXCHANGE (YONGSAN)
CENTRAL EXCHANGE (OSAN)
KOREA
SOUTHWEST EXCHANGE (KUNSAN)
SOUTHEAST EXCHANGE (PUSAN)

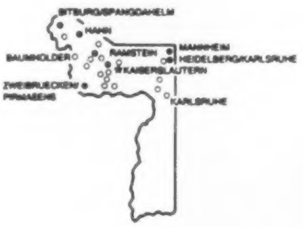
OVERSEAS EXCHANGE FACILITIES

GEOGRAPHY OF AAFES—EUROPE

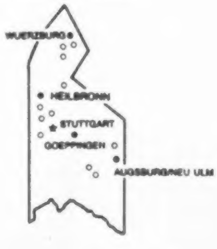

SARDINIA
CRETE

★ AREA EXCHANGE
● EXCHANGE MANAGER
○ MAJOR EXCHANGE FACILITIES

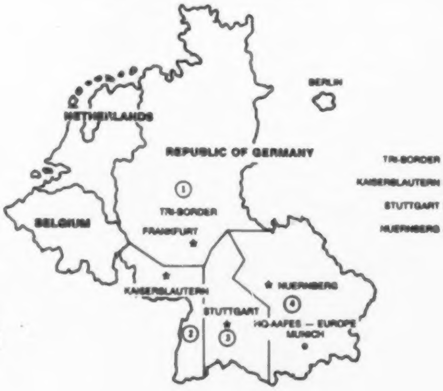
KAISERSLAUTERN AREA EXCHANGE


BITBURG/SPANGDAHLEM
HAHN
BAUMHOLDER
RAMSTEIN
MANNHEIM
HEIDELBERG/KARLSRUHE
KAISERSLAUTERN
ZWEIBRUECKEN/
PIRMASENS
KARLSRUHE

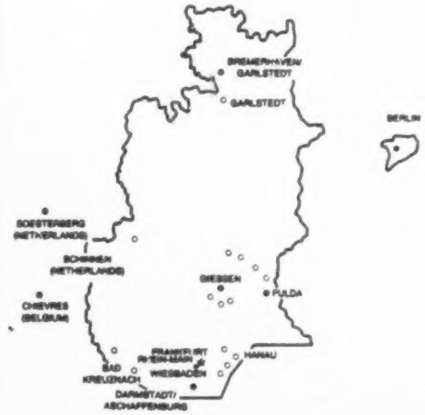
STUTTGART AREA EXCHANGE


WUERZBURG
HEILBRONN
STUTTGART
GOEPPINGEN
AUGSBURG/NEU ULM

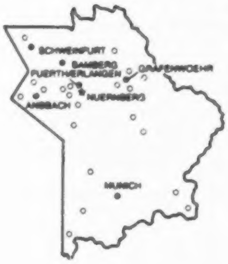
GERMANY AREA EXCHANGES


BERLIN
NETHERLANDS
REPUBLIC OF GERMANY
BELGIUM
①
TRI-BORDER
FRANKFURT
KAISERSLAUTERN
STUTTGART
NUERNBERG
④
HQ-AAFES — EUROPE
MUNICH
②
③
TRI-BORDER 1
KAISERSLAUTERN 2
STUTTGART 3
NUERNBERG 4

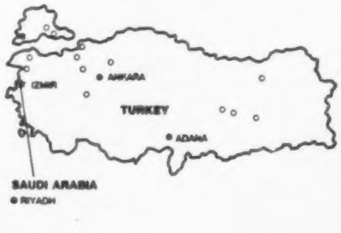
TRI-BORDER AREA EXCHANGE


BREMERHAVEN/
GARLSTEDT
GARLSTEDT
BERLIN
SOESTERBERG
(NETHERLANDS)
SCHINNEN
(NETHERLANDS)
GIESSEN
FULDA
CHIEVRES
(BELGIUM)
FRANKFURT
RHEIN-MAIN
HANAU
BAD
KREUZNACH
WIESBADEN
DARMSTADT/
ASCHAFFENBURG

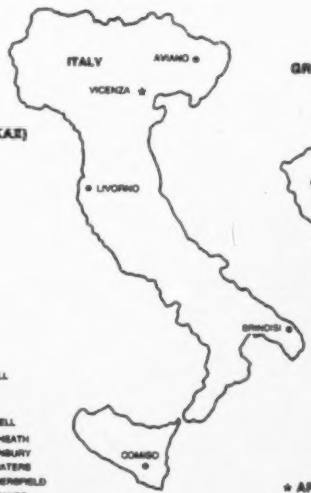
NUERNBERG AREA EXCHANGE


SCHWEINFURT
BAMBERG
FUERTH/ERLANGEN
GRAFENWOEHR
ANSBACH
NUERNBERG
MUNICH

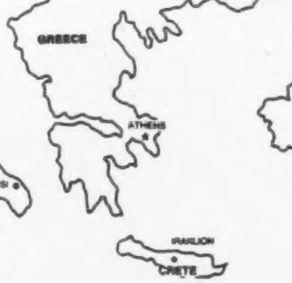
TURKEY AREA EXCHANGE (TUAX)


IZMIR
ANKARA
TURKEY
ADANA
SAUDI ARABIA
RIYADH

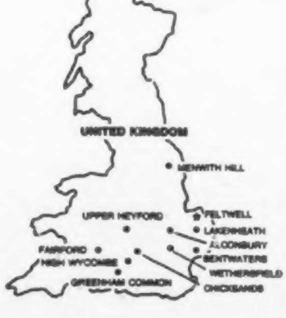
ITALY AREA EXCHANGE (ITAX)


ITALY
AVIANO
VICENZA
LIVORNO
BRINDISI
COMISO

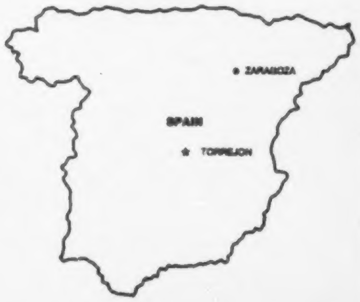
GREECE AREA EXCHANGE (GRAX)


GREECE
ATHENS
IRAKLION
CRETE

UNITED KINGDOM AREA EXCHANGE (UKAX)


UNITED KINGDOM
MENWITH HILL
UPPER HEYFORD
FELTWELL
LAKENHEATH
ALCONBURY
FAIRFORD
HIGH WYCOMBE
BENTWATERS
WETHERSFIELD
GREENHAM COMMON
CHICKSANDS

SPAIN AREA EXCHANGE (SPAX)


ZARAGOZA
SPAIN
TORREJON

★ AREA EXCHANGE
● EXCHANGE MANAGER

AAFES Exchange Sales
(FY88)

Summary of Sales by Retail Department ($ in Thousands)

Department/Dept. Code	CONUS		Overseas		Mail Order		Worldwide		% Change 88 vs. 87
	$	%	$	%	$	%	$	%	
Automotive/01	88,507	3.2	49,879	2.5	71	0.2	138,457	2.9	7.1
Gasoline/02	249,909	9.1	135,821	6.7			385,730	8.0	0.9
Automotive Labor/03	14,882	0.5	3,586	0.2			18,468	0.4	12.0
Tobacco Products/10	95,520	3.5	35,593	1.8	6	/a	131,119	2.7	-1.5
DPSC Merchandise/19	117,565	4.3	44,577	2.2			162,142	3.4	-3.3
Food, Candy & Snacks/20	163,671	5.9	152,954	7.6	71	0.2	316,696	6.6	6.8
Beer & Beverages/23	128,176	4.6	111,331	5.5			239,507	5.0	2.8
Toiletries/30	147,178	5.3	86,790	4.3	368	0.9	234,336	4.6	6.0
Cosmetics & Fragrances/34	88,308	3.2	43,095	2.1	2	/a	131,405	2.7	16.8
Military Wear/40	60,241	2.2	26,152	1.3			86,393	1.8	-48.9
Jewelry/50	27,901	1.0	17,703	0.9	5,951	15.3	51,555	1.1	5.5
Watches/51	37,163	1.3	29,538	1.5	40	0.1	66,741	1.4	26.1
Precious & Semi-Precious Jewelry/56	46,411	1.7	44,168	2.2	72	0.2	90,651	1.9	-3.4
Stationery/60	137,846	5.0	66,238	3.3	994	2.5	205,078	4.0	5.7
Men's Outerwear/70	60,085	2.2	47,628	2.4	262	0.7	107,975	2.2	10.7
Men's Furnishings/71	109,142	4.0	64,190	3.2	184	0.5	173,516	3.5	3.0
Women's Outerwear/72	97,456	3.5	73,823	3.7	243	0.6	171,522	3.6	10.1
Women's Lingerie/73	63,734	2.3	27,382	1.4	441	1.1	91,557	1.9	5.0
Boyswear/74	26,706	1.0	20,383	1.0			47,089	1.0	1.9
Girlswear/75	23,920	0.9	19,355	1.0	4	/a	43,279	0.9	15.2
Infants' & Toddlers' Wear/76	30,954	1.1	23,980	1.2	19	/a	54,953	1.1	-5.7
Footwear/77	105,245	3.8	60,297	3.0	791	2.0	166,333	3.3	3.4
Linens & Domestics/78	43,026	1.6	30,400	1.5	532	1.4	73,958	1.5	-0.5
Yardage & Sewing Notions/79	6,475	0.2	12,352	0.6	475	1.2	19,302	0.4	-13.5
Dinnerware & Flatware/80	12,047	0.4	8,437	0.4	1,488	3.8	21,972	0.5	1.3
Kitchenware, Pots & Pans/81	33,514	1.2	22,643	1.1	490	1.3	56,647	1.2	3.3
Giftware/82	34,315	1.2	31,031	1.5	4,098	10.5	69,444	1.4	5.5
Cleaning Supplies/83	37,436	1.4	21,905	1.1	37	0.1	59,378	1.2	1.5
Traffic & Major Appliances/85	58,515	2.1	45,748	2.3	1,274	3.3	105,537	2.2	6.8
Furniture & Rugs/86	28,886	1.0	51,604	2.6	1,911	4.9	82,401	1.7	12.9
Hardware, Tools, Garden & Pet Supplies/87	74,416	2.7	30,296	1.5	110	0.3	104,822	2.1	5.6
Luggage/88	18,426	0.7	9,185	0.5	186	0.5	27,797	0.6	-3.1
Outdoor Living/89	68,825	2.5	10,021	0.5	67	0.2	78,913	1.6	4.3
Sporting Goods & Camping/91	41,553	1.5	27,476	1.4	1,228	3.1	70,257	1.5	9.0
Developed Film/92	14,088	0.5	3,838	0.2			17,926	0.4	-5.9
Photographic, Optical & Photo Processing/93	49,396	1.8	41,364	2.1	2,280	5.8	93,040	1.9	-8.6
Toys & Games/95	55,751	2.0	54,461	2.7	758	1.9	110,970	2.3	-0.3
Computers/96*	44,614	1.6	40,851	2.0	10	/a	85,475	1.8	—
Home Entertainment & Musical Instruments/97	170,930	6.2	310,564	15.4	14,296	36.6	495,790	10.3	-11.3
Recorded Sound/Video Cassettes/98	43,836	1.6	76,918	3.8	251	0.6	121,005	2.5	16.7
Total	**$2,756,569**	**100.0%**	**$2,013,557**	**100.0%**	**$39,010**	**100.0%**	**$4,809,136**	**100.0%**	**4.3%**

Note: AAFES sales for FY88 are preliminary and unaudited.
* New retail department
/a Less than 0.1%.

AAFES Exchange Sales
(FY88)

Alamo Exchange Region Sales by Retail Department ($ in Thousands)

Department/Dept. Code	FY88 Department Sales	% of All-Dept. Region Total	% of CONUS Dept. Total	% of Worldwide Dept. Total	FY87 Department Sales	Dept. Sales % Change 88/87
Automotive/01	22,736	3.3	25.7	16.4	16,312	39.4
Gasoline/02	61,794	8.9	24.7	16.0	46,008	34.3
Automotive Labor/03	3,422	0.5	23.0	18.5	2,131	60.6
Tobacco Products/10	27,408	3.9	28.7	20.9	16,824	62.9
DPSC Merchandise/19	30,167	4.3	25.7	18.6	21,512	40.2
Food, Candy & Snacks/20	43,039	6.2	26.3	13.6	28,467	51.2
Beer & Beverages/23	32,528	4.7	25.4	13.6	23,625	37.7
Toiletries/30	36,449	5.2	24.8	15.6	26,383	38.2
Cosmetics & Fragrances/34	23,432	3.4	26.5	17.8	15,981	46.6
Military Wear/40	17,291	2.5	28.7	20.0	12,340	40.1
Jewelry/50	7,016	1.0	25.1	13.6	5,216	34.5
Watches/51	10,365	1.5	27.9	15.5	7,230	43.4
Precious & Semi-Precious Jewelry/56	11,807	1.7	25.4	13.0	9,378	25.9
Stationery/60	35,068	5.0	25.4	17.1	24,418	43.6
Men's Outerwear/70	15,191	2.2	25.3	14.1	11,211	35.5
Men's Furnishings/71	26,804	3.8	24.6	15.4	19,063	40.6
Women's Outerwear/72	24,637	3.5	25.3	14.4	18,057	36.4
Women's Lingerie/73	16,498	2.4	25.9	18.0	12,236	34.8
Boyswear/74	6,460	0.9	24.2	13.7	4,754	35.9
Girlswear/75	5,931	0.8	24.8	13.7	3,834	54.7
Infants' & Toddlers' Wear/76	7,432	1.1	24.0	13.5	5,778	28.6
Footwear/77	26,448	3.8	25.1	15.9	19,722	34.1
Linens & Domestics/78	10,071	1.4	23.4	13.6	7,925	27.1
Yardage & Sewing Notions/79	1,602	0.2	24.7	8.3	1,968	-18.6
Dinnerware & Flatware/80	3,144	0.5	26.1	14.3	2,575	22.1
Kitchenware, Pots & Pans/81	7,880	1.1	23.5	13.9	5,825	35.3
Giftware/82	6,898	1.0	20.1	9.9	4,601	49.9
Cleaning Supplies/83	9,977	1.4	26.7	16.8	7,904	26.2
Traffic & Major Appliances/85	14,208	2.0	24.3	13.5	9,368	51.7
Furniture & Rugs/86	5,122	0.7	17.7	6.2	3,848	33.1
Hardware, Tools, Garden & Pet Supplies/87	18,466	2.6	24.8	17.6	13,748	34.3
Luggage/88	5,196	0.7	28.2	18.7	4,708	10.4
Outdoor Living/89	19,128	2.7	27.8	24.2	14,814	29.1
Sporting Goods & Camping/91	9,448	1.4	22.7	13.4	6,756	39.8
Developed Film/92	3,924	0.6	27.9	21.9	2,971	32.1
Photographic, Optical & Photo Processing/93	11,830	1.7	23.9	12.7	9,765	21.1
Toys & Games/95	14,055	2.0	25.2	12.7	9,702	44.9
Computers/96*	14,325	2.1	32.1	16.8	—	—
Home Entertainment & Musical Instruments/97	40,075	5.7	23.4	8.1	33,127	21.0
Recorded Sound/Video Cassettes/98	10,853	1.6	24.8	9.0	7,295	48.8
Total	**$698,125**	**100.0%**	**25.3%**	**14.5%**	**$497,380**	**40.4%**

* New retail department.

AAFES Exchange Sales

(FY88)

Capital Exchange Sales by Retail Department ($ in Thousands)

Department/Dept. Code	FY88 Department Sales	% of All-Dept. Region Total	% of CONUS Dept. Total	% of Worldwide Dept. Total	FY87 Department Sales	Dept. Sales % Change 88/87
Automotive/01	22,818	3.3	25.8	16.5	16,223	40.7
Gasoline/02	64,304	9.2	25.7	16.7	44,743	43.7
Automotive Labor/03	3,549	0.5	23.8	19.2	2,238	58.6
Tobacco Products/10	29,499	4.2	30.9	22.5	21,854	35.0
DPSC Merchandise/19	35,274	5.1	30.0	21.8	24,038	46.7
Food, Candy & Snacks/20	37,573	5.4	23.0	11.9	26,513	41.7
Beer & Beverages/23	28,780	4.1	22.5	12.0	19,196	49.9
Toiletries/30	38,059	5.5	25.9	16.2	28,100	35.4
Cosmetics & Fragrances/34	22,358	3.2	25.3	17.0	15,135	47.7
Military Wear/40	18,985	2.7	31.5	22.0	12,310	54.2
Jewelry/50	7,171	1.0	25.7	13.9	5,481	30.8
Watches/51	8,826	1.3	23.7	13.2	5,875	50.2
Precious & Semi-Precious Jewelry/56	11,105	1.6	23.9	12.3	9,042	22.8
Stationery/60	33,804	4.9	24.5	16.5	23,983	40.9
Men's Outerwear/70	17,584	2.5	29.3	16.3	11,827	48.7
Men's Furnishings/71	29,446	4.2	27.0	17.0	22,630	30.1
Women's Outerwear/72	25,868	3.7	26.5	15.1	19,081	35.6
Women's Lingerie/73	17,443	2.5	27.4	19.1	13,799	26.4
Boyswear/74	7,301	1.0	27.3	15.5	5,740	27.2
Girlswear/75	6,224	0.9	26.0	14.4	4,078	52.6
Infants' & Toddlers' Wear/76	7,821	1.1	25.3	14.2	6,390	22.4
Footwear/77	28,380	4.1	27.0	17.1	19,589	44.9
Linens & Domestics/78	11,152	1.6	25.9	15.1	9,137	22.1
Yardage & Sewing Notions/79	1,283	0.2	19.8	6.6	1,415	-9.3
Dinnerware & Flatware/80	2,559	0.4	21.2	11.6	2,119	20.8
Kitchenware, Pots & Pans/81	8,104	1.3	24.2	14.3	6,352	27.6
Giftware/82	10,361	1.6	30.2	14.9	7,955	30.2
Cleaning Supplies/83	9,205	1.3	24.6	15.5	6,644	38.5
Traffic & Major Appliances/85	12,470	1.8	21.3	11.8	9,202	35.5
Furniture & Rugs/86	3,942	0.6	13.6	4.8	2,502	57.6
Hardware, Tools, Garden & Pet Supplies/87	19,311	2.8	26.0	18.4	14,732	31.1
Luggage/88	4,722	0.7	25.6	17.0	3,564	32.5
Outdoor Living/89	17,720	2.5	25.7	22.5	12,376	43.2
Sporting Goods & Camping/91	7,843	1.1	18.9	11.2	5,232	49.9
Developed Film/92	3,424	0.5	24.3	19.1	2,526	35.6
Photographic, Optical & Photo Processing/93	12,718	1.8	25.7	13.7	10,931	16.3
Toys & Games/95	12,576	1.8	22.6	11.3	8,266	52.1
Computers/96*	7,462	1.1	16.7	8.7	—	—
Home Entertainment & Musical Instruments/97	39,253	5.6	23.0	7.9	34,069	15.2
Recorded Sound/Video Cassettes/98	10,262	1.5	23.4	8.5	6,475	58.5
Total	**$696,539**	**100.2%**	**25.3%**	**14.5%**	**$501,362**	**38.9 %**

* New retail department

AAFES Exchange Sales
(FY88)

Golden Gate Exchange Region Sales by Retail Department ($ in Thousands)

Department/Dept. Code	FY88 Department Sales	% of All-Dept. Region Total	% of CONUS Dept. Total	% of Worldwide Dept. Total	FY87 Department Sales	Dept. Sales % Change 88/87
Automotive/01	21,842	3.2	24.7	15.8	17,724	23.2
Gasoline/02	76,044	11.2	30.4	19.7	66,771	13.9
Automotive Labor/03	5,091	0.8	34.2	27.6	4,266	19.3
Tobacco Products/10	17,487	2.6	18.3	13.3	15,268	14.5
DPSC Merchandise/19	23,833	3.5	20.3	14.7	19,790	20.4
Food, Candy & Snacks/20	38,496	5.7	23.5	12.2	32,858	17.2
Beer & Beverages/23	23,086	3.4	18.0	9.6	19,769	16.8
Toiletries/30	33,243	4.9	22.6	14.2	26,698	24.5
Cosmetics & Fragrances/34	20,688	3.1	23.4	15.7	15,406	34.3
Military Wear/40	11,862	1.8	19.7	13.7	9,221	28.6
Jewelry/50	6,406	0.9	23.0	12.4	4,593	39.5
Watches/51	7,797	1.2	21.0	11.7	5,739	35.9
Precious & Semi-Precious Jewelry/56	12,786	1.9	27.5	14.1	11,571	10.5
Stationery/60	35,662	5.3	25.9	17.4	27,299	30.6
Men's Outerwear/70	14,464	2.1	24.1	13.4	11,276	28.3
Men's Furnishings/71	23,318	3.4	21.4	13.4	18,775	24.2
Women's Outerwear/72	25,987	3.8	26.7	15.2	20,249	28.3
Women's Lingerie/73	14,983	2.2	23.5	16.4	12,242	22.4
Boyswear/74	6,695	1.0	25.1	14.2	5,856	14.3
Girlswear/75	6,223	0.9	26.0	14.4	4,727	31.6
Infants' & Toddlers' Wear/76	8,237	1.2	26.6	15.0	7,432	10.8
Footwear/77	23,533	3.5	22.4	14.1	18,323	28.4
Linens & Domestics/78	11,295	1.7	26.3	15.3	9,457	19.4
Yardage & Sewing Notions/79	1,657	0.2	25.6	8.6	1,823	-9.1
Dinnerware & Flatware/80	3,259	0.5	27.1	14.8	2,691	21.1
Kitchenware, Pots & Pans/81	9,280	1.4	27.7	16.4	7,944	16.8
Giftware/82	9,623	1.4	28.0	13.9	7,200	33.7
Cleaning Supplies/83	7,526	1.1	20.1	12.7	6,218	21.0
Traffic & Major Appliances/85	14,754	2.2	25.2	14.0	12,596	17.1
Furniture & Rugs/86	11,026	1.6	38.2	13.4	6,722	64.0
Hardware, Tools, Garden & Pet Supplies/87	17,277	2.6	23.2	16.5	13,541	27.6
Luggage/88	3,339	0.5	18.1	12.0	3,090	8.1
Outdoor Living/89	15,272	2.3	22.2	19.4	11,965	27.6
Sporting Goods & Camping/91	12,472	1.8	30.0	17.8	10,021	24.5
Developed Film/92	4,064	0.6	28.8	22.7	3,835	6.0
Photographic, Optical & Photo Processing/93	12,883	1.9	26.1	13.8	12,093	6.5
Toys & Games/95	15,642	2.3	28.1	11.8	13,199	18.5
Computers/96*	12,995	0.1	29.1	15.2	—	—
Home Entertainment & Musical Instruments/97	45,134	6.7	26.4	9.1	45,107	0.1
Recorded Sound/Video Cassettes/98	11,254	1.7	25.7	8.5	8,865	26.9
Total	**$676,515**	**98.2%**	**24.5%**	**14.1%**	**$552,220**	**22.5%**

* New retail department

AAFES Exchange Sales
(FY88)

Southeast Exchange Region Sales by Retail Department ($ in Thousands)

Department/Dept. Code	FY88 Department Sales	% of All-Dept. Region Total	% of CONUS Dept. Total	% of Worldwide Dept. Total	FY87 Department Sales	Dept. Sales % Change 88/87
Automotive/01	21,111	3.1	23.9	15.2	19,402	8.8
Gasoline/02	47,767	7.0	19.1	12.4	51,426	-7.1
Automotive Labor/03	2,821	0.4	19.0	15.3	2,630	7.3
Tobacco Products/10	21,127	3.1	22.1	16.1	20,363	3.8
DPSC Merchandise/19	28,143	4.1	23.9	17.4	28,879	-2.5
Food, Candy & Snacks/20	44,563	6.5	27.2	14.1	39,720	12.2
Beer & Beverages/23	43,782	6.4	34.2	18.3	44,701	-2.1
Toiletries/30	39,428	5.8	26.8	16.8	36,818	7.1
Cosmetics & Fragrances/34	21,829	3.2	24.7	16.6	19,551	11.7
Military Wear/40	12,102	1.8	20.1	14.0	11,691	3.5
Jewelry/50	7,308	1.1	26.2	14.2	6,524	12.0
Watches/51	10,174	1.5	27.4	15.2	9,724	4.6
Precious & Semi-Precious Jewelry/56	10,713	1.6	23.1	11.8	13,194	-18.8
Stationery/60	33,312	4.9	24.2	16.2	31,140	7.0
Men's Outerwear/70	12,846	1.9	21.4	11.9	12,273	4.7
Men's Furnishings/71	29,574	4.3	27.1	17.0	27,100	9.1
Women's Outerwear/72	20,964	3.1	21.5	12.2	21,171	-1.0
Women's Lingerie/73	14,809	2.2	23.2	16.2	14,134	4.8
Boyswear/74	6,251	0.9	23.4	13.3	6,575	-4.9
Girlswear/75	5,542	0.8	23.2	12.8	4,842	14.5
Infants' & Toddlers' Wear/76	7,465	1.1	24.1	13.6	8,206	-9.0
Footwear/77	26,883	3.9	25.5	16.2	27,332	-1.6
Linens & Domestics/78	10,508	1.5	24.4	14.2	10,414	0.9
Yardage & Sewing Notions/79	1,934	0.3	29.9	10.0	2,245	-13.9
Dinnerware & Flatware/80	3,084	0.5	25.6	14.0	2,820	9.4
Kitchen, Pots & Pans/81	8,250	1.2	24.6	14.6	8,129	1.5
Giftware/82	7,433	1.1	21.7	10.7	6,039	23.1
Cleaning Supplies/83	10,728	1.6	28.7	18.1	9,906	8.3
Traffic & Major Appliances/85	17,084	2.5	29.2	16.2	17,959	-4.9
Furniture & Rugs/86	8,797	1.3	30.5	10.7	11,048	-20.4
Hardware, Tools, Garden & Pet Supplies/87	19,362	2.8	26.0	18.5	18,523	4.5
Luggage/88	5,169	0.8	28.1	18.6	4,919	5.1
Outdoor Living/89	16,705	2.4	24.3	21.2	16,570	0.8
Sporting Goods & Camping/91	11,789	1.7	28.4	16.8	11,606	1.6
Developed Film/92	2,677	0.4	19.0	14.9	3,193	-16.2
Photographic, Optical & Photo Processing/93	11,965	1.7	24.2	12.9	12,505	-4.3
Toys & Games/95	13,479	2.0	24.2	12.1	13,080	3.1
Computers/96*	9,832	1.4	22.0	11.5	—	—
Home Entertainment & Musical Instruments/97	46,470	6.8	27.2	9.4	49,214	-5.6
Recorded Sound, Video Cassettes/98	11,467	1.7	26.2	9.5	12,028	-4.7
Total	**$685,247**	**100.0%**	**24.9%**	**14.2%**	**$667,594**	**2.6%**

* New retail department.

AAFES Exchange Sales
(FY88)

Europe Sales by Retail Department ($ in Thousands)

Department/Dept. Code	FY88 Department Sales	% of All-Dept. Region Total	% of Overseas Dept. Total	% of Worldwide Dept. Total	FY87 Department Sales	Dept. Sales % Change 88/87
Automotive/01	38,780	2.7	77.7	28.0	35,180	10.2
Gasoline/02	95,772	6.7	70.5	24.8	90,064	6.3
Automotive Labor/03	1,961	0.1	54.7	10.6	1,421	38.0
Tobacco Products/10	25,745	1.8	72.3	19.6	27,134	-5.1
DPSC Merchandise/19	33,317	2.3	74.7	20.5	33,991	-2.0
Food, Candy & Snacks/20	111,048	7.7	72.6	35.1	100,356	10.7
Beer & Beverages/23	95,882	6.7	86.1	40.0	92,008	4.2
Toiletries/30	55,852	3.9	64.4	23.8	54,311	2.8
Cosmetics & Fragrances/34	26,625	1.8	61.8	20.3	23,377	13.9
Military Wear/40	21,561	1.5	82.4	25.0	19,794	8.9
Jewelry/50	13,541	0.9	76.5	26.3	11,801	14.7
Watches/51	22,516	1.6	76.2	33.7	14,417	56.2
Precious & Semi-Precious Jewelry/56	26,995	1.9	61.1	29.8	27,264	-1.0
Stationery/60	43,268	3.0	65.3	21.1	40,981	5.6
Men's Outerwear/70	41,304	2.9	86.7	38.3	35,644	15.9
Men's Furnishings/71	51,090	3.5	79.6	29.4	51,307	-0.4
Women's Outerwear/72	60,738	4.2	82.3	35.4	50,289	20.8
Women's Lingerie/73	20,710	1.4	75.6	22.6	20,310	2.0
Boyswear/74	17,083	1.2	83.8	36.3	16,088	6.2
Girlswear/75	15,791	1.1	81.6	36.5	13,888	13.7
Infants' & Toddlers' Wear/76	19,072	1.3	79.5	34.7	19,731	-3.3
Footwear/77	47,935	3.3	79.5	28.8	45,668	5.0
Linens & Domestics/78	21,192	1.5	69.7	28.7	21,601	-1.9
Yardage & Sewing Notions/79	8,880	0.6	71.9	46.0	9,111	-2.5
Dinnerware & Flatware/80	6,491	0.5	76.9	29.5	5,660	14.7
Kitchenware, Pots & Pans/81	15,418	1.1	68.1	27.2	15,168	1.6
Giftware/82	25,542	1.8	82.3	36.8	27,892	-8.4
Cleaning Supplies/83	15,155	1.1	69.2	25.5	15,195	-0.3
Traffic & Major Appliances/85	25,563	1.8	55.9	24.2	23,429	9.1
Furniture & Rugs/86	29,054	2.0	56.3	35.3	25,153	15.5
Hardware, Tools, Garden & Pet Supplies/87	20,906	1.5	69.0	19.9	18,667	12.0
Luggage/88	7,431	0.5	80.9	26.7	7,332	1.4
Outdoor Living/89	5,692	0.4	56.8	7.2	5,691	0.0
Sporting Goods & Camping/91	18,810	1.3	68.5	26.8	16,950	11.0
Developed Film/92	1,567	0.1	40.8	8.7	650	141.1
Photographic, Optical & Photo Processing/93	26,211	1.8	63.4	28.2	29,440	-11.0
Toys & Games/95	41,893	2.9	76.9	37.8	44,729	-6.3
Computers/96*	29,321	2.0	71.8	34.3	—	—
Home Entertainment & Musical Instruments/97	197,795	13.7	63.7	39.9	229,523	-13.8
Recorded Sound, Video Cassettes/98	56,009	3.9	72.8	46.3	43,418	29.0
Total	**$1,439,516**	**100.0%**	**71.5%**	**29.9%**	**$1,364,833**	**5.5%**

* New department.

AAFES Exchange Sales
(FY88)

Pacific Sales by Retail Department ($ in Thousands)

Department/Dept. Code	FY88 Department Sales	% of All-Dept. Region Total	% of Overseas Dept. Total	% of Worldwide Dept. Total	FY87 Department Sales	Dept. Sales % Change 88/87
Automotive/01	11,100	1.9	22.3	8.0	9,884	12.3
Gasoline/02	40,049	7.0	29.5	10.4	38,471	4.1
Automotive Labor/03	1,625	0.3	45.3	8.8	1,383	17.5
Tobacco Products/10	9,849	1.7	27.7	7.5	9,619	2.4
DPSC Merchandise/19	11,260	2.0	25.3	6.9	10,565	6.6
Food, Candy & Snacks/20	41,906	7.3	27.4	13.2	38,896	7.7
Beer & Beverages/23	15,449	2.7	13.9	6.5	12,681	21.8
Toiletries/30	30,938	5.4	35.6	13.2	25,038	23.6
Cosmetics & Fragrances/34	16,470	2.9	38.2	12.5	11,958	37.7
Military Wear/40	4,592	0.8	17.6	5.3	4,291	7.0
Jewelry/50	4,162	0.7	23.5	8.1	3,078	35.2
Watches/51	7,022	1.2	23.8	10.5	4,654	50.9
Precious & Semi-Precious Jewelry/56	17,172	3.0	38.9	18.9	15,878	8.1
Stationery/60	22,970	4.0	34.7	11.2	20,363	12.8
Men's Outerwear/70	6,323	1.1	13.3	5.9	5,153	22.7
Men's Furnishings/71	13,100	2.3	20.4	7.5	11,628	12.7
Women's Outerwear/72	13,086	2.3	17.7	7.6	10,881	20.3
Women's Lingerie/73	6,672	1.2	24.4	7.3	5,533	20.6
Boyswear/74	3,300	0.6	16.2	7.0	3,009	9.7
Girlswear/75	3,564	0.6	18.4	8.2	2,909	22.5
Infants' & Toddlers' Wear/76	4,909	0.9	20.5	8.9	5,551	–11.6
Footwear/77	12,362	2.2	20.5	7.4	10,693	15.6
Linens & Domestics/78	9,208	1.6	30.3	12.5	8,732	5.5
Yardage & Sewing Notions/79	3,472	0.6	28.1	18.0	3,715	–6.5
Dinnerware & Flatware/80	1,946	0.3	23.1	8.9	1,947	–0.1
Kitchenware, Pots & Pans/81	7,225	1.3	31.9	12.8	5,790	24.8
Giftware/82	5,489	1.0	17.7	7.9	3,795	44.6
Cleaning Supplies/83	6,750	1.2	30.8	11.4	6,033	11.9
Traffic & Major Appliances/85	20,185	3.5	44.1	19.1	17,030	18.5
Furniture & Rugs/86	22,550	3.9	43.7	27.4	19,213	17.4
Hardware, Tools, Garden & Pet Supplies/87	9,390	1.6	31.0	9.0	7,520	24.9
Luggage/88	1,754	0.3	19.1	6.3	1,417	23.8
Outdoor Living/89	4,330	0.8	43.2	5.5	3,944	9.8
Sporting Goods & Camping/91	8,667	1.5	31.5	12.3	6,951	24.7
Developed Film/92	2,272	0.4	59.2	12.7	2,946	–22.9
Photographic, Optical & Photo Processing/93	15,153	2.6	36.6	16.3	15,662	–3.2
Toys & Games/95	12,567	2.2	23.1	11.3	11,824	6.3
Computers/96*	11,529	2.0	28.2	13.5	—	—
Home Entertainment & Musical Instruments/97	112,769	19.6	36.3	22.7	117,394	–3.9
Recorded Sound, Video Cassettes/98	20,909	3.6	27.2	17.3	17,125	22.1
Total	**$574,045**	**100.0%**	**28.5%**	**11.9%**	**$513,154**	**11.9%**

* New department.

Alamo Exchange Region

Base/Post	Retail	Gasoline	Food	Services	Vending	Theaters	Total
Altus AFB, OK	5,069,456	542,357	226,613	1,158,351	428,728	36,675	7,462,180
Barksdale AFB, LA	20,197,150	2,681,477	981,520	2,708,922	1,096,121	34,578	27,699,768
Camp Beauregard, LA	526,942	0	0	0	0	0	526,942
Bergstrom AFB, TX	17,761,166	1,204,975	1,360,150	2,206,492	797,581	23,959	23,354,323
Bismark, ND	234,833	0	0	0	0	0	234,833
Ft. Bliss, TX	43,722,645	4,300,995	5,033,098	7,936,706	5,114,854	49,603	66,157,901
Brooks AFB, TX	2,840,501	489,754	69,995	597,016	402,394	0	4,399,660
Cannon AFB, NM	6,566,325	743,564	2,228,880	964,649	598,403	32,323	11,134,144
Carswell AFB, TX	27,167,381	2,857,888	669,079	2,683,887	998,008	31,407	34,407,650
Ft. Chaffee, AR	2,838,929	75,571	208,873	150,995	85,493	14,173	3,374,034
Camp Clark, MO	65,979	0	0	0	0	0	65,979
Des Moines, IA	702,662	0	0	0	0	0	702,662
Camp Dodge, IA	655,077	0	0	0	138	0	655,215
Duluth ANG, MN	1,531,913	0	0	0	0	0	1,531,913
Dyess AFB, TX	8,303,256	1,130,714	529,312	991,781	820,529	26,652	11,802,244
Eaker AFB, AR	5,579,361	810,502	147,111	1,006,512	361,602	26,583	7,931,671
Ellington, TX	789,511	0	0	0	2,760	0	792,271
Ellsworth AFB, SD	9,524,073	1,072,004	1,351,508	2,261,538	779,294	122,337	15,110,754
England AFB, LA	6,203,639	730,003	206,227	1,073,490	516,062	8,614	8,738,035
Forbes Field, KS	240,677	0	0	0	0	0	240,677
Goodfellow AFB, TX	5,279,620	489,746	178,408	1,526,005	730,838	42,587	8,247,204
Grand Forks AFB, ND	9,415,595	1,099,665	1,477,552	2,112,764	796,769	57,666	14,960,011

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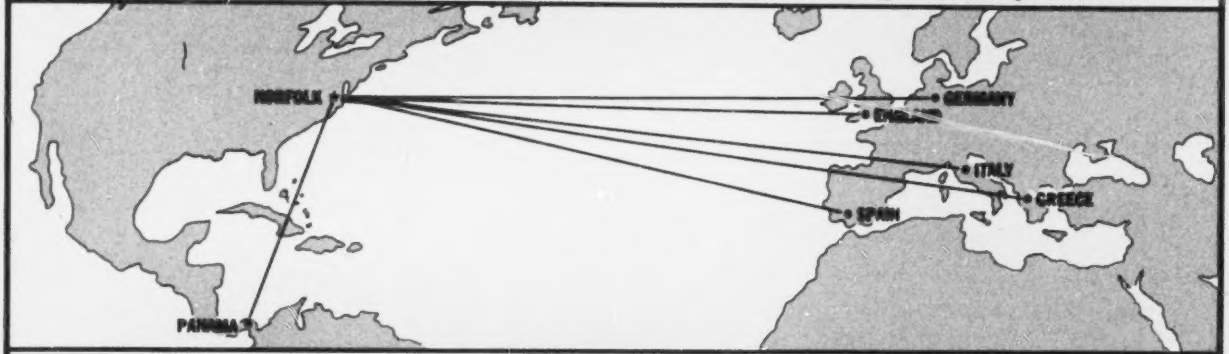

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Military Distributors of Virginia, Inc. EXPORT DIVISION

3587 Argonne Ave., Norfolk, Va. 23509 · 804-855-0114

Base/Post	Retail	Gasoline	Food	Services	Vending	Theaters	Total
Granite City, IL	1,814,099	146,338	0	0	2,414	0	1,962,851
Gruber, AR	191,588	0	13,109	0	0	0	204,697
Hector Field, ND	486,691	0	0	0	0	0	486,691
Holloman AFB, NM	9,658,007	1,040,879	918,678	1,342,744	798,662	48,269	13,807,239
Ft. Hood, TX	60,871,224	6,532,873	8,828,476	16,208,000	5,701,595	226,851	98,369,019
Hq AAFES, TX	1,837,802	0	743,067	0	89,003	0	2,669,872
Jefferson City, MO	186,834	0	0	0	0	0	186,834
Kelly AFB, TX	1,753,782	760,525	462,380	438,280	712,197	0	4,127,164
Kirtland AFB, NM	15,207,395	1,680,332	742,421	1,473,910	742,628	53,727	19,900,413
Lackland AFB, TX	46,389,703	1,628,200	2,620,308	21,334,000	7,154,533	101,490	79,228,234
Laughlin AFB, TX	3,902,762	783,345	210,302	829,739	328,149	25,019	6,079,316
Ft. Leavenworth, KS	12,645,982	1,197,591	2,335,795	1,579,625	1,811,045	77,641	19,647,679
Ft. Leonard Wood, MO	22,442,141	2,034,134	4,149,029	7,950,845	5,991,586	403,564	42,971,299
Lincoln, NE	521,603	0	0	0	0	0	521,603
Little Rock AFB, AR	13,580,146	1,300,378	615,767	1,103,927	762,454	32,310	17,394,982
Camp Mabry, TX	525,490	0	0	3,720	0	0	529,210
McAlester, OK	630,016	0	0	0	2,230	0	632,246
McConnell AFB, KS	6,035,262	714,697	249,059	1,077,137	627,610	23,561	8,727,326
Ft. McCoy, WI	6,658,206	117,983	670,886	1,259,553	375,857	16,578	9,099,063
Minot AFB, ND	9,957,931	1,311,190	1,745,129	1,953,770	845,196	63,852	15,877,068
Offutt AFB, NE	22,579,152	1,776,214	1,706,188	3,013,830	1,498,000	36,739	30,610,123
Pine Bluff Arsenal, AR	223,821	0	0	0	0	0	223,821
Ft. Polk, LA	25,973,429	2,724,157	4,204,161	7,373,260	3,556,580	111,646	43,943,233
Randolph AFB, TX	19,929,180	1,684,201	806,546	1,470,305	871,760	41,331	24,803,323
Red River AD, TX	667,337	0	0	0	240,876	0	908,213
Reese AFB, TX	4,212,700	433,937	63,122	973,030	389,221	0	6,072,010
Ft. Riley, KS	18,653,407	2,944,391	4,351,556	4,883,697	5,714,754	133,237	36,681,042
Camp Ripley, MN	1,841,435	0	284,986	36,343	6,010	0	2,168,774
Ft. Sam Houston, TX	50,326,541	2,557,788	5,164,068	8,180,304	4,948,624	138,887	71,316,212
Scott AFB, IL	22,467,215	2,573,194	2,489,028	2,966,371	1,353,141	104,026	31,952,975
Sheppard AFB, TX	17,458,404	1,760,802	1,593,008	7,470,648	3,237,445	130,780	31,651,087
Ft. Sill, OK	28,013,754	3,882,131	4,095,406	11,968,000	3,110,245	189,488	51,259,024
St. Louis, MO	373,394	0	0	0	0	0	373,394
Tinker AFB, OK	17,898,364	2,355,899	539,413	2,483,213	642,609	28,051	23,947,549
Truax Field, WI	739,583	0	0	0	0	0	739,583
Twin Cities, MN	3,810,538	155,879	0	0	23,164	0	3,989,581
Vance AFB, OK	2,083,671	312,967	0	231,141	179,827	0	2,807,606
Volk Field, WI	347,048	0	0	0	5,493	0	352,541
Whiteman AFB, MO	4,713,684	563,187	245,621	610,419	549,561	27,224	6,709,696
White Sands MR, NM	2,524,270	591,558	475,388	218,009	561,158	19,761	4,390,144
ALER Totals	**$835,350,282**	**$61,793,965**	**$64,991,223**	**$135,812,928**	**$66,363,201**	**$2,541,189**	**$966,852,806**

Note: AAFES sales for FY88 are preliminary and unaudited.

Capital Exchange Region

Base/Post	Retail	Gasoline	Food	Services	Vending	Theaters	Total
Aberdeen PG, MD	12,814,825	1,495,033	1,891,019	5,351,974	3,085,750	43,394	24,681,995
Andrews AFB, MD	37,849,952	3,504,185	1,303,423	6,038,535	1,826,452	113,986	50,636,533
Ft. A.P. Hill, VA	931,790	0	105,434	0	172,505	0	1,209,729
Arlington Hall Station, VA	217,817	0	0	31,207	55,314	0	304,338
Arnold AFS, TN	719,814	0	13,756	0	0	0	733,570
Atterbury, TN	446,259	0	0	0	5,521	0	451,780
Battle Creek, MI	466,970	0	0	135	0	0	467,105

Base/Post	Retail	Gasoline	Food	Services	Vending	Theaters	Total
Bayonne, NJ	709,823	100,806	0	33,360	244,364	0	1,088,353
Bellwood DGSC, VA	940,769	0	0	0	0	0	940,769
Ft. Belvoir, VA	35,125,140	3,786,337	2,203,094	5,935,540	2,303,163	72,034	49,425,308
Ft. Benjamin Harrison, IN	12,739,473	880,985	1,901,858	1,939,570	1,847,593	118,802	19,428,281
Billy Mitchel BX, WI	588,749	0	0	0	6,363	0	595,112
Bolling AFB, DC	17,241,727	2,614,157	931,425	4,353,150	627,993	52,459	25,820,911
Calumet AFS, MI	35,122	4,297	0	0	0	0	39,419
Cameron Station, VA	26,114,034	1,752,555	469,486	2,516,253	190,308	0	31,042,636
Ft. Campbell, KY	36,217,907	5,020,312	5,044,843	7,990,221	4,731,336	213,853	59,218,472
Carlisle Barracks, PA	5,804,456	497,269	75,677	1,650,663	351,526	13,927	8,393,518
Chanute AFB, IL	13,134,872	1,333,039	742,034	4,044,000	2,859,431	228,544	22,341,920
Charleston Armory, WV	405,667	0	0	0	0	0	405,667
Chattanooga, TN	802,722	0	0	0	0	0	802,722
Ft. Detrick, MD	907,659	238,286	0	2,827,281	98,086	0	4,071,312
Ft. Devens, MA	20,497,644	1,940,199	2,040,272	3,610,551	2,255,292	140,699	30,484,657
Ft. Dix, NJ	43,365,159	2,659,712	4,132,121	9,255,623	7,714,847	122,247	67,249,709
Dover AFB, DE	10,791,493	1,006,412	1,024,966	1,965,865	1,229,073	83,894	16,101,703
Ft. Drum, NY	15,658,664	1,657,217	2,539,750	3,232,044	1,925,144	72,160	25,084,979
Edgewood, MD	880,298	0	242,777	134,309	818	0	1,258,202
Ft. Eustis, VA	19,330,791	2,597,461	2,474,894	5,964,769	2,489,784	109,356	32,967,055
Ft. George G. Meade, MD	307,684,425	1,691,626	820,851	2,960,161	1,670,681	65,026	314,892,770
Camp Grayling, MI	1,229,889	0	88,236	0	20,634	0	1,338,759
Griffiss AFB, NY	9,718,527	1,253,522	211,062	743,745	642,997	50,601	12,620,454
Grissom AFB, IN	5,315,974	1,141,520	295,770	469,822	520,501	22,496	7,766,083
Ft. Hamilton, NY	6,730,672	375,516	423,381	1,359,563	391,203	19,869	9,300,204
Hancock Field, NY	384,937	0	0	5,870	0	0	390,807
Hanscom AFB, MA	9,612,046	1,166,921	204,629	1,551,971	435,702	38,648	13,009,917
Ft. Indiantown Gap, PA	4,320,898	202,248	76,194	69,267	54,174	0	4,722,781
Camp Keyes, ME	500,344	0	0	0	0	0	500,344
K.I. Sawyer AFB, MI	6,822,089	1,304,369	347,347	575,969	500,798	85,889	9,636,461
Ft. Knox, KY	33,252,331	3,997,818	5,795,375	6,660,801	6,451,925	204,699	56,362,949
Langley AFB, VA	22,473,284	3,450,750	1,228,260	5,402,983	1,227,340	76,559	33,859,176
Ft. Lee, VA	21,562,263	2,403,117	3,996,569	7,149,575	4,487,401	114,595	39,713,520
Letterkenny AD, PA	288,737	0	0	240	0	0	288,977
Lexington, KY	430,712	0	0	0	0	0	430,712
Loring AFB, ME	5,314,850	797,210	445,806	1,093,980	761,064	74,521	8,487,431
Martinsburg, WV	144,125	0	0	0	0	0	144,125
McGhee Tyson ANG, TN	1,205,990	0	0	0	194	0	1,206,184
Ft. McGuire, NJ	3,120,075	478,368	847,803	905,912	344,435	25,058	5,721,651
Ft. McNair, DC	817,251	324,933	0	126,841	132,474	3,241	1,404,740
Ft. Myer, VA	13,985,177	2,204,037	636,675	3,623,397	1,257,987	38,069	21,745,342
U.S. Military Academy, NY	10,865,074	1,229,624	156,263	1,229,006	2,339,980	82,776	15,902,723
Milwaukee, WI	797,723	0	0	0	0	0	797,723
Ft. Monmouth, NJ	9,499,466	1,076,469	417,160	1,934,112	671,088	44,037	13,642,332
Ft. Monroe, VA	3,665,894	556,683	119,598	276,621	223,061	9,013	4,850,870
Nashville ANGB, TN	1,218,928	0	0	0	0	0	1,218,928
Newark AFS, OH	185,483	0	0	0	883	0	186,366
New Cumberland AD, PA	589,040	131,420	0	58,300	227	0	778,987
Niagara AFS, NY	1,477,120	0	0	902,951	30,670	0	2,410,741
Oakdale, PA	3,694,697	0	105,560	67,868	50,703	0	3,918,828
O'Hare Airport, IL	1,306,538	0	0	0	59,423	0	1,365,961
Camp O'Neil, CT	1,045,886	0	0	0	0	0	1,045,886
Ozark, MO	61,014	0	0	0	0	0	61,014
Pease AFB, NH	11,525,423	1,574,312	212,634	1,714,049	591,516	24,057	15,641,991
Pedricktown, NJ	457,492	0	0	0	0	0	457,492
Camp Perry, OH	199,696	0	0	31,242	11,107	1,000	243,045

Base/Post	Retail	Gasoline	Food	Services	Vending	Theaters	Total
Phelps Collins ANG, MI	131,238	0	0	0	0	0	131,238
Picatinny Arsenal, NJ	678,058	0	0	0	142,710	0	820,768
Ft. Pickett, VA	1,177,335	87,105	110,479	0	164,854	24,539	1,564,312
Pittsburgh, PA	566,214	0	0	0	0	0	566,214
Plattsburgh AFB, NY	6,777,923	972,567	61,272	1,484,005	744,232	24,420	10,064,419
Pomona, NJ	388,676	0	15,056	0	0	0	403,732
Port Austin, MI	36,780	0	0	0	0	0	36,780
Rickenbacker ANG, OH	2,553,319	206,379	0	27,392	113,411	0	2,900,501
Ft. Ritchie, MD	1,915,799	481,195	0	84,083	154,041	16,428	2,651,546
Rock Island, IL	807,365	0	10,921	0	599,220	0	1,417,506
Selfridge, MI	9,386,850	1,179,008	350,192	362,975	274,771	23,525	11,577,321
Seneca AD, NY	514,451	0	271,653	29,118	36,916	0	852,138
Ft. Sheridan, IL	6,108,435	318,163	311,942	694,113	357,309	0	7,789,962
Smyrna, TN	672,290	0	0	0	0	0	672,290
U.S. Soldiers & Airmens Home, DC	1,052,485	0	424,179	42,399	757,455	0	2,276,518
Ft. Story, VA	1,564,429	400,124	41,792	59,849	1,219,878	0	3,286,072
Tobyhanna AD, PA	976,247	88,185	27,450	9,618	0	0	1,101,500
Ft. Totten, NY	1,178,870	0	0	19,609	16,902	0	1,215,381
Vint Hill Farms, VA	1,996,632	418,808	0	2,733	128,717	0	2,546,890
Walter Reed AMC, DC	8,536,494	590,624	417,970	1,217,967	1,902,723	0	12,665,778
Warfield, MO	195,619	0	0	0	0	0	195,619
Watervliet Arsenal, NY	797,027	0	0	0	20,881	0	817,908
Westover, MA	7,087,998	426,750	0	346,904	147,133	0	8,008,785
Wright-Patterson AFB, OH	27,877,762	1,713,124	1,009,058	3,370,472	1,207,038	80,936	35,258,390
Wurtsmith AFB, MI	8,015,871	973,597	150,580	1,137,392	409,626	64,458	10,751,524
Youngstown, OH	315,272	0	0	10,525	6,588	0	332,385
CPER Totals	**$907,553,105**	**$64,304,354**	**$46,768,546**	**$114,688,450**	**$65,303,236**	**$2,599,815**	**$1,201,217,506**

Note: AAFES sales for FY88 are preliminary and unaudited.

Golden Gate Exchange Region

Base/Post	Retail	Gasoline	Food	Services	Vending	Theaters	Total
Beale AFB, CA	10,101,590	2,140,273	635,679	1,508,345	436,039	30,206	14,852,132
Ft. Carson, CO	19,818,139	3,680,022	4,170,157	4,507,651	4,541,608	91,055	36,808,632
Castle AFB, IL	11,324,008	1,573,344	549,456	1,369,570	567,881	87,770	15,472,029
Davis-Monthan AFB, AZ	17,715,879	1,730,124	1,708,886	3,780,544	696,275	52,701	25,684,409
Ft. Douglas, UT	1,466,386	0	0	0	44,499	0	1,510,885
Dugway PG, UT	1,329,718	449,857	0	60,758	111,089	29,826	1,981,248
Edwards AFB, CA	13,709,818	3,106,360	3,474,058	2,323,538	956,387	93,372	23,663,533
Fairchild AFB, WA	11,810,687	1,278,325	1,171,520	1,694,354	762,888	58,700	16,776,474
F.E. Warren AFB, WY	4,821,392	992,336	192,896	771,208	457,413	36,135	7,271,380
Fitzsimons AMC, CO	7,068,543	666,774	433,790	282,099	275,314	32,143	8,758,663
George AFB, CA	10,296,605	1,673,430	1,742,802	1,562,555	1,182,882	49,178	16,507,452
Gila Bend AFAF, AZ	156,940	0	0	0	18,537	0	175,477
Gowen, ID	536,615	0	0	5,292	0	0	541,907
Camp Guernsey, WY	93,815	0	0	0	0	0	93,815
Hill AFB, UT	10,091,498	1,217,155	292,429	954,409	880,222	15,695	13,451,408
Ft. Huachuca, AZ	14,776,996	1,457,796	2,940,718	3,322,897	1,414,732	82,084	23,995,223
Indian Springs AFAF, NV	131,139	0	0	0	161,537	0	292,676
Ft. Irwin, CA	8,665,193	1,461,745	2,559,128	1,523,905	2,422,951	152,723	16,785,645
Kingsley Field, OR	337,429	0	0	6,362	29,430	0	373,221
Ft. Lawton, WA	499,140	0	0	0	0	0	499,140
Ft. Lewis, WA	47,877,595	5,939,204	8,715,615	13,478,000	7,007,140	174,463	83,192,017
Ft. Hunter-Liggett, CA	1,597,352	176,922	327,699	590,910	253,875	11,501	2,958,259

Base/Post	Retail	Gasoline	Food	Services	Vending	Theaters	Total
Los Alamitos AFRC, CA	4,598,554	457,383	205,055	280,217	34,655	0	5,575,864
Los Angeles AFB, CA	6,704,685	986,462	272,734	954,004	415,933	0	9,333,818
Lowry AFB, CO	27,746,777	2,646,574	2,248,497	5,700,938	3,742,634	87,895	42,173,315
Luke AFB, AZ	15,453,140	668,230	1,875,410	2,126,594	696,052	47,226	20,866,652
Malmstrom AFB, MT	5,560,921	707,309	232,707	1,201,046	488,116	24,016	8,214,115
March AFB, CA	18,851,934	3,597,539	750,853	1,805,432	14,053	52,455	25,072,266
Mather AFB, CA	18,968,388	1,016,842	796,805	2,575,341	576,268	54,712	23,988,356
McClellan AFB, CA	16,853,503	2,333,611	528,022	1,973,971	589,539	46,500	22,325,146
McChord AFB, CA	30,078,496	1,675,148	1,371,252	685,092	0	45,852	33,855,840
Lake Meade Annex, NV	105,387	0	0	0	1,220	0	106,607
Monterey, CA	3,543,721	0	716,756	4,724,439	27,939	50,439	9,063,294
Mountain Home AFB, ID	7,674,717	851,339	948,947	1,164,826	724,762	56,643	11,421,234
Navajo AD, AZ	72,310	0	0	0	0	0	72,310
Nellis AFB, NV	22,038,599	1,789,643	2,653,561	3,959,838	626,398	59,503	31,127,542
Norton AFB, CA	18,164,992	3,529,599	3,059,599	3,958,628	1,491,202	64,104	30,268,124
Oakland AB, CA	393,347	357,287	0	285,105	141,373	0	1,177,112
Camp San Luis Obispo, CA	240,331	0	0	0	0	0	240,331
Onizuka AFS, CA	319,492	0	98,574	0	0	0	418,066
Ft. Ord, CA	37,379,138	6,949,571	6,226,626	4,921,455	5,387,315	201,046	61,065,151
Camp Parks, CA	94,846	0	0	0	0	0	94,846
Peterson AFB, CO	14,610,622	2,173,893	575,455	827,614	598,764	33,848	18,820,196
Presidio of S.F., CA	18,305,801	1,783,034	1,327,359	2,909,014	1,490,321	83,046	25,898,575
Pueblo Depot, CO	107,668	0	0	0	0	0	107,668
Reno Site, NV	36,420	0	0	0	0	0	36,420
Camp Roberts, CA	195,387	0	263,253	2,252	215,422	10,304	686,618
Sacramento AD, CA	172,839	198,359	0	0	0	0	371,198
Sharpe AD, CA	414,667	0	0	0	0	0	414,667
Sierra AD, CA	630,273	0	180,480	0	15,005	31,231	856,989
Travis AFB, CA	26,739,911	3,403,811	4,837,256	3,380,706	1,819,557	102,713	40,283,954
USAF Academy, CO	13,367,557	1,954,370	619,117	2,156,201	1,895,304	20,837	20,013,386
Vancouver Barracks, WA	2,908,992	0	30,183	25,104	0	0	2,964,279
Vandenberg AFB, CA	12,631,586	2,328,881	1,176,538	2,474,463	857,543	115,073	19,584,084
Williams AFB, AZ	8,904,904	942,981	530,663	821,312	484,471	47,213	11,731,544
Yakima, WA	816,141	0	0	78,526	429,126	0	1,323,793
Yuma Proving Ground, AZ	569,579	274,266	360,564	102,539	202,758	0	1,509,706
GGER Totals	**$529,482,102**	**$68,169,799**	**$50,801,099**	**$86,837,054**	**$45,186,429**	**$2,232,208**	**$792,708,691**

Note: AAFES sales for FY88 are preliminary and unaudited.

Southeast Exchange Region

Base/Post	Retail	Gasoline	Food	Services	Vending	Theaters	Total
Ft. Benning, GA	52,605,337	4,075,646	6,630,184	12,264,000	9,804,882	391,020	85,771,069
Camp Blanding, FL	1,467,635	0	0	0	0	0	1,467,635
Ft. Bragg, NC	58,188,736	6,015,910	9,033,129	11,234,000	7,442,714	150,762	92,065,251
Charleston AFB, SC	11,254,909	1,060,020	693,212	2,782,698	803,152	29,137	16,623,128
Columbus AFB, MS	4,315,419	535,961	110,662	753,695	529,182	22,123	6,267,042
Dobbins AFB, GA	2,766,802	0	0	0	89,883	0	2,856,685
Eglin AFB, FL	27,491,587	3,657,815	2,946,497	3,231,625	1,615,828	50,320	38,993,672
Ft. Fisher AFS, NC	71,875	0	0	0	0	0	71,875
Ft. McClellan, AL	21,041,876	1,290,613	2,322,815	5,674,717	1,524,983	69,881	31,924,885
Ft. Gillem, GA	9,837,215	0	256,637	350,341	0	0	10,444,193
Ft. Gordon, GA	25,425,993	2,125,771	4,645,254	7,391,912	6,413,366	240,998	46,243,294
Gulfport, MS	227,940	0	0	0	0	0	227,940

Base/Post	Retail	Gasoline	Food	Services	Vending	Theaters	Total
Gunter AFS, AL	3,609,370	712,885	0	0	0	10,733	4,332,988
Homestead AFB, FL	19,849,641	1,517,824	2,031,170	2,951,248	869,563	47,880	27,267,326
Hunter AAF, GA	8,748,725	531,030	278,503	2,572,773	867,469	21,965	13,020,465
Hurlburt Field, FL	5,026,831	696,459	81,922	333,295	92,615	27,672	6,258,794
Ft. Jackson, SC	35,967,401	1,209,954	2,511,487	10,832,000	6,382,441	163,564	57,066,847
Keesler AFB, MS	27,263,967	2,430,155	1,729,673	6,219,932	2,041,648	273,693	39,959,068
Kingsport, TN	272,977	0	0	0	0	0	272,977
MacDill AFB, FL	31,124,560	1,630,714	2,369,758	2,924,436	960,283	23,239	39,032,990
Maxwell AFB, AL	19,586,443	607,269	962,283	3,109,918	1,501,221	17,215	25,784,349
Ft. McPherson, GA	4,124,011	587,119	533,808	1,740,798	1,209,439	0	8,195,175
Camp Frank D. Merrill, GA	157,931	0	0	0	0	0	157,931
Moody AFB, GA	6,421,042	816,221	447,077	556,491	539,055	9,579	8,789,465
Myrtle Beach AFB, SC	8,191,805	529,188	214,233	1,113,933	606,708	29,369	10,685,236
New Orleans, LA	467,568	0	0	0	0	0	467,568
Patrick AFB, FL	22,295,323	822,361	1,355,913	2,206,949	751,149	32,790	27,464,485
Redstone Arsenal, AL	16,198,933	1,395,934	1,782,399	4,399,672	1,259,043	37,488	25,073,469
Robins AFB, GA	13,326,063	1,257,793	376,200	1,512,234	421,554	38,798	16,932,642
Ft. Rucker, AL	18,923,898	1,926,819	1,749,078	3,549,075	2,449,315	130,885	28,729,070
Seymour Johnson AFB, NC	9,319,015	730,596	125,283	1,571,283	829,231	43,005	12,618,413
Shaw AFB, SC	13,256,478	1,536,753	341,454	1,996,003	593,827	42,326	17,766,841
Camp Shelby, MS	2,715,468	0	49,615	0	6,805	34,273	2,806,161
Ft. Stewart, GA	22,644,679	1,936,971	4,506,105	5,069,116	3,788,621	223,496	38,168,988
Thompson Field, MS	1,027,105	0	0	0	0	0	1,027,105
Tyndall AFB, FL	11,025,675	1,194,221	1,540,485	1,599,283	761,393	48,571	16,169,628
Van Nuys ANG, LA	647,409	0	0	23,500	0	0	670,909
Vicksburg, MS	344,326	0	0	0	0	0	344,326
SEER Totals	**$517,231,968**	**$40,832,002**	**$49,624,836**	**$97,964,927**	**$54,155,370**	**$2,210,782**	**$762,019,885**

AAFES Exchange Sales

(FY88)

Overseas

Europe Exchange Region

Base/Post	Retail	Gasoline	Food	Services	Vending	Theaters	Total
Alconbury, U.K.	14,472,472	2,635,633	3,153,268	1,505,751	615,028	141,392	22,523,544
Ansbach, FRG	9,576,987	0	657,642	1,191,797	1,557,796	9,141	12,993,363
Aschaffenberg, FRG	11,945,610	984,524	2,973,418	1,511,182	0	233,189	17,647,923
Athens, Greece	43,100,053	620,606	1,371,497	942,275	198,334	81,649	146,314,414
Augsburg, FRG	25,313,617	2,174,725	3,884,157	2,165,406	0	280,346	33,818,251
Azores	9,982,613	455,132	1,815,906	1,948,988	258,785	129,712	14,591,136
Babenhausen, FRG	3,984,141	0	1,530,927	255,603	0	68,156	5,838,827
Bad Aibling, FRG	545,948	0	0	66,736	0	12,607	625,291
Bad Hersfeld, FRG	2,138,324	0	494,664	176,031	0	46,088	2,855,107
Bad Kissingen, FRG	2,259,685	338,043	763,615	237,861	70,884	103,778	3,773,866
Bad Kreuznach, FRG	9,791,833	760,522	1,780,457	1,237,928	662,330	133,084	14,366,154
Bad Toelz, FRG	1,861,295	0	159,555	174,289	0	21,105	2,216,244
Bamberg, FRG	20,932,694	1,329,129	4,904,231	1,366,621	1,062,170	255,587	29,850,432
Baumholder, FRG	27,442,165	2,209,924	3,525,966	2,801,176	0	257,502	36,236,733
Bentwaters, U.K.	15,079,503	2,736,705	2,850,653	1,860,951	737,848	126,020	23,391,680
Berchtesgaden, FRG	1,037,633	0	0	0	0	0	1,037,633
Berlin, FRG	34,146,142	1,255,653	4,526,037	3,279,924	1,405,657	286,571	44,899,984
Bindlach, FRG	1,990,660	0	0	0	0	3,201	1,993,861
Bitburg, FRG	21,326,335	2,435,469	2,169,645	1,690,088	0	273,711	27,895,248
Boebling, FRG	2,922,217	0	2,625,419	451,415	0	24,101	6,023,152

Base/Post	Retail	Gasoline	Food	Services	Vending	Theaters	Total
Bremerhaven, FRG	13,366,009	873,761	1,096,287	1,310,242	1,676,498	33,499	18,356,296
Brindisi, Italy	6,934,247	0	1,075,760	592,659	359,710	77,214	9,039,590
Brussels, Belgium	840,080	0	207,064	59,844	3,663	7,927	1,118,578
Buedingen, FRG	1,639,396	0	54,369	68,718	0	31,960	1,794,443
Bueren, FRG	390,848	0	0	0	0	0	390,848
Butzbach, FRG	1,864,277	0	0	64,928	65,749	50,054	2,045,008
Chicksands, U.K.	5,106,710	603,342	444,227	802,319	194,826	21,333	7,172,757
Chievres, Belgium	12,625,898	0	1,093,264	1,800,894	366,869	77,287	15,964,212
Coleman, FRG	3,857,401	0	2,177,285	129,730	0	0	6,164,416
Comiso, Italy	4,805,355	0	949,971	788,417	383,341	61,753	6,988,837
Crailsheim, FRG	2,656,603	0	191,010	405,940	0	510	3,254,063
Crete	3,550,723	133,397	211,074	139,343	137,655	52,377	4,224,569
Croughton, U.K.	2,839,339	0	313,388	2,805	0	0	3,155,532
Darmstadt, FRG	14,805,744	1,357,192	1,812,336	1,376,238	1,506,077	127,199	20,984,786
Dexheim, FRG	2,210,134	0	692,733	194,561	15,756	13,357	3,126,541
Erlangen, FRG	6,216,509	643,094	1,446,602	704,491	0	80,102	9,090,798
Erlensee, FRG	2,968,940	0	1,554,381	64,494	0	0	4,587,815
Eschborn, FRG	1,995,864	1,653,032	0	120,841	0	0	3,769,737
Ettlingen, FRG	421,394	0	1,076,874	107,944	0	0	1,606,212
Fairford, U.K.	4,155,085	760,527	303,296	486,572	110,760	15,627	5,831,867
Feltwell, U.K.	4,641,184	0	41,601	545,807	0	0	5,228,592
Finthen, FRG	710,901	0	125,883	129,462	0	0	966,246
Fischbach, FRG	235,645	0	30,301	37,125	0	0	303,071
Flensburg, FRG	429,252	0	43,169	0	0	0	472,421
Florennes, Belgium	1,812,188	0	231,170	532,150	0	269	2,575,777
Frankfurt, FRG	52,420,181	3,126,896	5,334,333	5,641,351	1,871,825	357,032	68,751,618
Friedberg, FRG	7,032,405	0	916,712	243,650	48,340	82,953	8,324,060
Fuerth, FRG	56,818,807	3,711,257	3,544,929	3,567,627	2,106,770	270,034	70,019,424
Fulda, FRG	9,501,347	859,130	979,338	1,204,453	995,777	282,197	13,822,242
Garlstedt, FRG	14,893,388	7,834	3,722,606	1,329,278	2,238	166,891	20,122,235
Garmisch, FRG	4,254,758	0	0	205,932	0	0	4,460,690
Geilnkra, FRG	170,199	0	0	13,795	0	0	183,994
Gelnhausen, FRG	5,476,844	371,116	736,068	392,704	0	63,492	7,040,224
Germersheim, FRG	356,835	0	0	17,595	0	0	374,430
Ghedibr, Italy	279,226	0	1,012,950	2,050	445,514	0	1,739,740
Giessen, FRG	25,492,870	2,345,480	3,083,177	2,683,655	2,406,149	198,633	36,209,964
Goeppingen, FRG	7,178,205	499,438	1,065,737	163,360	0	114,941	9,021,681
Gonsenheim, FRG	1,670,198	0	697,813	359,542	23,552	0	2,751,105
Grafenworehr, FRG	20,638,668	887,122	3,463,538	858,803	1,980,117	438,216	28,266,464
Greenham Common, U.K.	4,778,754	1,039,621	74,456	637,273	253,616	30,258	6,813,978
Hahn AFB, FRG	21,126,520	2,433,151	2,605,155	1,942,356	0	131,364	28,238,546
Halekoa, FRG	5,765,200	0	0	0	0	0	5,765,200
Hanau, FRG	37,373,631	2,957,557	3,456,161	4,401,440	2,037,185	389,139	50,615,113
Heidelberg, FRG	37,276,975	1,054,648	4,644,191	3,647,630	0	279,040	46,902,484
Heilbronn, FRG	17,826,842	1,214,862	2,917,438	2,398,275	0	187,638	24,545,055
Herborns, FRG	248,718	0	0	19,686	0	0	268,404
Herzogen, FRG	1,001,444	0	250,209	234,810	0	8,925	1,495,388
Highway Combi, U.K.	488,848	0	372,575	7,603	0	0	869,026
Hohenfels, FRG	1,563,332	49,305	1,161,025	207,634	0	73,593	3,054,889
Illesheim, FRG	5,987,406	539,219	398,597	62,632	0	70,390	7,058,244
Kaiserslautern, FRG	61,707,379	6,242,893	5,338,396	4,356,505	0	448,004	78,093,177
Karlsruhe, FRG	15,481,172	1,221,718	1,436,253	705,998	0	152,602	18,997,743
Katterbach, FRG	5,294,783	0	3,280,913	314,636	87,010	106,867	9,084,209
Kirchgoens, FRG	5,055,074	941,771	1,311,825	570,318	0	178,790	8,057,778
Kitzengen, FRG	15,619,131	1,349,979	3,209,714	961,143	0	197,415	21,337,382
Knielsin, FRG	1,041,501	0	0	324,335	0	0	1,365,836
Lakenheath, U.K.	27,545,715	2,920,317	2,580,443	4,177,407	1,342,769	139,825	38,706,476

Base/Post	**Retail**	**Gasoline**	**Food**	**Services**	**Vending**	**Theaters**	**Total**
Landstuh, FRG	1,352,064	0	816,171	296,596	0	0	2,464,831
Lindsey, FRG	2,013,441	0	1,823,054	592,807	14,022	72,295	4,515,619
Livorno, Italy	5,493,570	10,033	818,056	483,396	214,935	38,777	7,058,767
Ludwigsburg, FRG	2,836,346	1,160,588	1,216,007	895,848	0	136,488	6,245,277
Mainz, FRG	11,859,399	167,158	657,541	5,085,476	50,244	102,033	17,921,851
Mannheim, FRG	31,261,172	3,458,343	5,413,309	3,393,486	0	496,403	44,022,713
Menwith Hill, U.K.	1,868,951	413,354	0	388,596	0	0	2,670,901
Miesau, FRG	825,019	0	362,183	51,628	0	0	1,238,830
Milden Hall, U.K.	8,315,901	1,829,388	1,317,242	669,952	133,841	153,890	12,420,214
Munchweigen, FRG	320,264	0	2,020,745	23,587	0	0	2,364,596
Munich, FRG	16,286,802	1,328,795	2,808,358	1,601,199	893,330	207,955	23,126,439
Neckarsulm, FRG	534,644	0	189,929	89,868	0	0	814,441
Nellingen, FRG	2,256,217	775,926	1,769,737	1,042,256	0	112,322	5,956,458
Neubruecken, FRG	604,679	0	296,964	96,098	0	11,790	1,009,531
Neu Ulm, FRG	12,163,947	744,659	2,265,052	721,280	0	161,665	16,056,603
Nuernberg, FRG	1,999,020	0	2,719,768	120,581	0	87,018	4,926,387
Obersteim, FRG	801,565	0	1,365,962	903	0	11,289	2,179,719
Oberurse, FRG	317,185	0	1,427,378	53,296	0	0	1,797,859
Oldenforf, FRG	1,995,641	0	0	87,065	28,044	0	2,110,750
Oslo, Norway	1,110,367	0	0	0	0	4,268	1,114,635
Pieri, FRG	456,433	0	0	3,958	183,104	0	643,495
Pirmasens, FRG	12,694,022	1,412,202	1,826,714	1,228,305	0	148,033	17,309,276
Rimini, Italy	455,439	0	0	0	489	0	455,928
Ramstein AB, FRG	51,451,229	4,376,076	3,800,378	3,766,325	0	377,798	63,771,806
Rheinberg, FRG	1,536,098	0	230,604	191,661	9,724	0	1,968,087
Rhein Main, FRG	33,113,763	2,867,949	3,882,048	4,846,572	1,018,875	365,698	46,094,905
Sardinia, Italy	2,338,973	0	0	53,898	17,059	0	2,409,930
Saudi Arabia	2,939,379	0	0	14,332	0	0	2,953,711
Schinnen, NL	9,923,403	0	777,498	966,564	25,092	11,905	11,704,462
Schwabach, FRG	1,055,683	0	401,555	92,853	0	8,061	1,558,152
Schwaebisch, FRG	3,112,159	0	500,364	548,795	0	36,730	4,198,048
Schweinfurt, FRG	22,854,420	1,322,387	3,622,579	1,345,930	1,169,778	151,570	30,466,664
Sembach AB, FRG	7,427,819	0	1,809,559	494,818	0	207,130	9,939,326
Siegelbach, FRG	216,570	0	0	37,559	0	0	254,129
Soegel, FRG	458,837	0	0	8,743	0	0	467,580
Soesterberg, NL	8,399,919	0	222,665	254,670	542,606	32,684	9,452,544
Sondrestrom AB, Greenland	2,241,114	0	0	332,721	0	17,552	2,591,387
Spangdahlem AB, FRG	16,248,959	2,355,077	2,272,544	1,148,355	0	268,259	22,293,194
Stuttgart, FRG	45,585,853	1,909,051	4,165,265	4,144,721	0	171,267	55,976,157
Torrejon, Spain	22,423,030	1,885,527	3,906,613	7,244,871	937,132	225,931	36,623,104
Upper Heyford, U.K.	23,260,978	3,347,825	2,904,154	1,367,826	680,923	83,507	31,645,213
Upwood, U.K.	436,070	0	76,789	0	0	0	512,859
Vaihinge, U.K.	8,857,325	1,331,185	831,224	1,641,584	0	173,411	12,834,729
Vicenza, Italy	16,823,450	445	2,004,664	1,269,097	280,428	222,374	20,600,458
Vilseck, FRG	5,579,215	729,762	4,175,922	238,429	0	180,581	10,903,909
Wackernheim, FRG	779,818	0	159,567	142,114	8,310	0	1,089,809
Welford, U.K.	133,586	0	872,496	59,180	0	0	1,065,262
Wertheim, FRG	3,616,943	448,799	578,876	360,081	0	67,139	5,071,838
Wethersfield, U.K.	933,129	224,008	24,047	82,598	0	11,442	1,275,224
Wiesbaden, FRG	37,062,955	1,278,440	1,901,234	3,744,897	1,971,112	479,470	46,438,108
Wildflecken, FRG	7,943,928	854,192	2,220,701	471,421	31,625	0	11,521,867
Woodbridge, U.K.	1,349,198	0	108,236	258,550	0	0	1,715,984
Wuerzburg, FRG	31,077,790	1,841,728	5,523,103	1,436,574	0	206,637	40,085,832
Zaragoza, Spain	5,380,567	437,053	684,350	1,457,696	184,374	85,037	8,229,077
Zirnforf, FRG	1,227,943	0	1,269,484	336,105	218,833	9,359	3,061,724
Zweibruecken, FRG	9,847,084	1,664,309	426,977	1,177,117	0	133,363	13,248,850
AAFES-Europe Totals	**$1,435,755,284**	**$95,907,983**	**$190,421,320**	**$131,445,860**	**$33,604,478**	**$12,776,778**	**$1,899,911,703**

Note: AAFES sales for FY88 are preliminary and unaudited.

AAFES Exchange Sales
(FY88)

Pacific Exchange Region

Base/Post	Retail	Gasoline	Food	Services	Vending	Theaters	Total
Adana, Turkey	9,693,181	451,042	1,174,989	1,723,317	219,774	99,081	13,361,384
Albrook AFS, Panama	13,935,906	0	806,474	4,568,107	1,292	0	19,311,779
Amador, Panama	494,414	336,087	0	0	0	58,831	889,332
Ankara, Turkey	4,678,737	0	354,627	1,342,759	120,792	13,959	6,510,874
Aviano, Italy	9,521,953	0	1,760,071	1,470,364	319,479	133,134	13,205,001
Baguio, Philippines	991,807	89,236	0	0	0	0	1,081,043
Bellows, HI	924,597	100,810	0	0	259	0	1,025,666
Big Island, HI	2,330,184	7,744	174,094	3,255	55,859	0	2,571,136
Camp Butler, Okinawa	38,173,567	2,860,269	0	69,702	0	288,031	41,391,569
Cak Makli, Turkey	1,415,457	0	0	102,216	32,856	0	1,550,529
Camp Zama, Japan	11,178,492	611,435	1,966,688	1,615,453	408,901	77,880	15,858,849
Clark, Philippines	36,457,954	3,975,495	6,544,075	7,885,862	1,095,763	288,468	56,247,617
Clayton, Panama	4,255,459	0	3,213,643	6,810,069	383,270	312,443	14,974,884
Clear AFS, AK	535,829	0	0	399	0	0	536,228
Concoli, Panama	384,595	0	0	0	0	0	384,595
Corozal AFS, Panama	25,826,458	760	974,392	406,944	0	0	27,208,554
Camp Akins, Korea	368,516	0	0	0	0	0	368,516
Camp Ames, Korea	348,288	0	162,987	6,474	0	0	517,749
Camp Carroll, Korea	2,257,258	0	1,445,532	553,065	25,581	27,792	4,309,228
Camp Casey, Korea	15,160,014	362,291	5,669,375	12,098,000	29,446	98,593	33,417,719
Camp Castle, Korea	288,635	0	0	0	0	0	288,635
Camp Coiner, Korea	593,858	0	1,418,814	0	0	48,137	2,060,809
Camp Colber, Korea	344,286	0	0	43,013	0	0	387,299
Camp Courtney, Okinawa	1,022,919	0	0	183,596	0	28,599	1,235,114
Camp Edwards, Korea	1,345,028	0	0	0	0	0	1,345,028
Camp Essayo, Korea	1,369,393	0	226,389	71,613	0	627	1,668,022
Camp Foster, Okinawa	1,133,289	0	11,071,838	10,414,000	91,408	152,781	22,863,316
Camp Garryo, Korea	735,196	0	0	0	0	0	735,196
Camp Greave, Korea	2,872,793	0	421,831	0	0	32,223	3,326,847
Camp Hansen, Korea	7,684,816	299,702	2,038,951	0	0	296,866	10,320,335
Camp Henry, Korea	233,325	0	880,534	5,793,683	1,238,730	46,469	8,192,741
Camp Hovey, Korea	2,081,849	0	1,056,371	127,322	0	37,080	3,302,622
Camp Howze, Korea	3,067,152	0	647,472	212,434	6,271	35,877	3,969,206
Camp Humphreys, Korea	8,786,352	0	2,301,809	616,900	56,792	96,231	11,858,084
Camp Kinser, Okinawa	4,100,993	0	1,282,711	0	9,140,667	78,247	14,602,618
Camp Kyle, Korea	433,489	0	0	0	0	0	433,489
Camp Laguar, Korea	419,269	0	0	0	0	0	419,269
Camp Lester, Okinawa	725,158	0	0	589,149	0	0	1,314,307
Camp Long, Korea	1,781,043	0	499,331	178,299	1,985	17,930	2,478,588
Camp Market, Korea	604,352	0	0	0	0	0	604,352
Camp Mercer, Korea	520,716	0	0	478,767	0	0	999,483
Camp Page, Korea	848,186	0	0	291,997	0	20,781	1,160,964
Camp Pelham, Korea	669,654	0	0	468,361	0	0	1,138,015
Camp Red Cloud, Korea	5,998,155	0	1,246,707	2,403,005	33,822	89,103	9,770,792
Camp Schwab, Okinawa	2,438,060	0	289,895	0	0	198,272	2,926,227
Camp Stanley, Korea	5,354,460	0	880,632	119,436	7,010	38,583	6,400,121
Ft. Richardson, AK	11,491,090	1,844,625	1,263,467	651,973	110,612	50,081	15,411,848
Camp Walker, Korea	9,165,437	249,381	1,935,530	259,573	0	0	11,609,921
Curundu, Panama	1,247,682	2,978,016	164,806	0	0	0	4,390,504
Ft. Davis, Panama	3,265,384	561,109	572,553	619,016	0	122,141	5,140,203
Diyarbak, Turkey	562,474	0	25,302	52,907	9,526	0	650,209
Eielson AFB, AK	10,178,470	1,579,859	356,133	1,830,023	12,726	63,888	14,021,099

Base/Post	Retail	Gasoline	Food	Services	Vending	Theaters	Total
Elmendorf AFB, AK	29,404,856	2,968,656	2,211 735	8,953,942	1,966,217	58,313	45,563,719
First Brigade, Korea	508,951	0	0	0	0	0	508,951
Futenma, Okinawa	3,057,600	0	0	0	1,488	84,547	3,143,635
Galena AP, AK	667,062	0	0	0	0	0	667,062
Ft. Greely, AK	2,315,921	166,049	321,655	19,848	109,457	48,805	2,981,735
Guam	27,320,485	2,298,580	3,172,967	3,637,095	799,360	111,470	37,339,957
Ft. Gulick, Panama	1,810,315	0	156,065	0	438,443	0	2,404,823
Hickam, HI	48,880,256	4,285,925	5,557,097	81,005,597	1,397,701	187,186	141,313,762
Honduras	5,218,024	0	200,733	34,401	32,896	0	5,486,054
Howard AFB, Panama	8,057,182	1,349,558	1,046,436	1,498,479	14,252	478,504	12,444,411
Istanbul, Turkey	335,957	0	0	0	0	0	335,957
Izmir, Turkey	4,718,681	0	262,672	1,245,146	103,189	26,301	6,355,989
Johnston Island, HI	1,679,178	0	0	165,093	0	0	1,844,271
K2, Korea	1,534,694	0	0	0	0	10,089	1,544,783
Kadena, Okinawa	66,693,090	5,236,867	17,876,090	13,933,000	153,212	453,504	104,345,763
King Salmon AP, AK	621,505	0	0	1,700	0	0	623,205
Korea Center, Korea	632 352	0	0	144,788	0	0	777,140
Korean Th, Korea	457,272	0	380,141	272,178	1,977,330	0	3,086,921
Kunsan AB, Korea	6,052,127	206,340	1,090,055	3,253,715	777,208	87,580	11,467,025
Kwanju, Korea	828,014	0	253,879	151,382	6,872	7,762	1,247,909
Maui, HI	98,108	0	0	0	0	0	98,108
Misawa, Japan	23,194,734	1,322,798	5,505,558	3,742,180	1,208,124	276,712	35,250,106
Okinawa South, Okinawa	8,559,321	0	0	0	7,319	0	8,566,640
Osan, Korea	17,229,898	1,497,175	6,226,100	10,742,000	1,779,739	327,965	37,802,877
Puerto Rico	39,752,487	1,254,444	1,132,211	2,310,011	201,849	0	44,651,002
Pusan, Korea	6,469,385	292,680	1,279,093	559,889	21,538	19,686	8,642,251
Quarry, Panama	369,458	0	0	1,839	0	7,233	378,530
Ft. Richardson, AK	1,038,484	0	0	26,216	79,972	0	1,144,672
RC4, Korea	1,246,468	0	0	0	0	0	1,246,468
Samoa	1,296,189	0	0	0	0	0	1,296,189
Schofield Barracks, HI	44,050,398	6,731,176	6,945,002	12,569,000	3,558,629	170,814	74,025,019
Ft. Shafter, HI	14,806,789	4,179,486	1,522,547	93,645	54,386	19,408	20,676,261
Shemya AFB, AK	1,685,996	0	416,446	2,479,035	34,717	0	4,616,194
Ft. Sherman, Panama	463,529	0	0	0	113,878	24,858	602,265
Sinop, Turkey	1,390,121	0	83,910	207,857	77,446	0	1,759,334
Suwon, Korea	2,990,885	0	252,638	35,570	0	0	3,279,093
Thailand	2,087,399	0	139,033	518,256	370	2,278	2,747,336
Thule AFB, Greenland	3,902,199	0	0	1,091,729	0	36,437	5,030,365
Torii Station, Okinawa	631,487	0	0	0	0	4,770	636,257
Tripler, HI	599,878	0	689,482	51,096	0	0	1,340,456
Ft. Wainwright, AK	13,465,241	1,265,203	251,821	1,234,058	1,518,587	44,610	17,779,520
Wallace, Philippines	533,081	32,784	55,803	11,005	0	0	632,673
Wheeler, HI	1,258,370	935,287	93,836	102,581	1,393	10,569	2,402,036
Yokota, Japan	31,499,555	1,829,894	6,494,154	5,186,750	1,476,244	256,351	46,742,948
Yongsan, Korea	41,339,144	2,643,309	12,662,028	23,844,000	2,026,580	256,795	82,771,856
AAFES-Pacific Totals	**$741,047,755**	**$54,804,052**	**$129,107,210**	**$243,184,134**	**$33,341,217**	**$5,864,675**	**$1,207,349,043**

Note: AAFES sales for FY88 are preliminary and unaudited. Alaska and Hawaii sales are included.

AAFES Totals

	FY88 $Sales						
	Retail	Gasoline	Food	Services	Vending	Theaters	Total
CONUS	**2,589,617,457**	**235,100,140**	**222,185,704**	**435,303,359**	**231,006,236**	**9,583,994**	**3,722,798,890**
Overseas	**2,176,803,039**	**150,712,035**	**319,528,530**	**374,629,994**	**66,945,695**	**18,641,453**	**3,107,260,746**
Worldwide	**$4,766,420,496**	**$385,812,175**	**$541,714,234**	**$809,933,353**	**$297,953,931**	**$28,225,447**	**$6,830,059,636**

Coast Guard NAFA Sales
(FY88)

Coast Guard Cutters

Store	FY88 $Sales			Total $ Sales FY87	Total Sales % Change 88 vs 87
	Retail*	Services* & Other	Total		
Coast Guard Cutters	$226,682	$74,316	$300,998	$315,884	-4.7%

CONUS

Store	Retail*	Services* & Other	Total	Total $ Sales FY87	Total Sales % Change 88 vs 87
AL: Mobile (Base), AL	1,550,329	317,163	1,867,492	1,738,507	7.4
Mobile, AL	6,180,323	602,817	6,783,140	7,421,545	-8.6
CA: Alameda, CA	909,459	218,731	1,128,190	1,077,661	4.7
Humboldt Bay, CA	84,290	995	85,285	91,134	-6.4
Petaluma, CA	850,414	310,430	1,160,844	1,131,423	2.6
San Diego, CA	47,489	0	47,489	49,087	-3.3
San Pedro, CA	161,244	32,616	193,860	174,932	10.8
CT: Coast Gd Academy, CT	4,666,643	1,042,052	5,708,695	5,939,424	-3.9
Long Island Sound, CT	519,238	0	519,238	468,489	10.8
FL: Clearwater, FL	1,522,793	18,762	1,541,555	1,592,016	-3.2
Mayport, FL	978,178	10,787	988,965	949,458	4.2
Miami, FL	7,140,310	181,849	7,322,159	n/a	n/a
St. Petersburg, FL	6,600,116	99,649	6,699,765	6,901,905	-2.9
LA: New Orleans, LA	378,910	64,751	443,661	440,281	0.8
MA: Boston, MA	1,450,966	198,878	1,649,844	1,604,230	2.8
Cape Cod, MA	10,782,129	24,694	10,806,823	9,910,084	9.0
MD: Coast Guard Yard, MD	332,177	159,784	491,961	566,423	-13.1
ME: South Portland, ME	2,724,654	90,452	2,815,106	2,672,727	5.3
MI: Grand Haven, MI	515,705	0	515,705	466,150	10.6
Sault Ste. Marie, MI	159,383	0	159,383	139,466	14.3
Traverse City, MI	724,747	7,877	732,624	786,838	-6.9
MO: St. Louis, MO	476,848	48,322	525,170	550,448	-4.6
NC: Elizabeth City, NC	1,909,286	298,541	2,207,827	2,093,427	5.5
NJ: Cape May, NJ	3,134,345	577,079	3,711,424	4,147,593	-10.5
NY: Brooklyn, NY	3,790,136	59,585	3,849,721	3,637,458	5.8
New York, NY	4,930,310	1,337,073	6,267,383	5,792,680	8.2
OH: Cleveland, OH	1,166,808	444,407	1,611,215	1,466,346	9.9
North Coast Exch, OH	4,832,026	279	4,832,305	3,707,306	30.3
OR: Astoria, OR	1,379,207	144,980	1,524,187	1,368,050	11.4
North Bend, OR	787,811	0	787,811	629,679	25.1
Portland, OR	299,917	0	299,917	306,611	-2.2
PA: Philadelphia, PA	321,420	0	321,420	n/a	n/a
SC: Base Fort Macon, SC	65,900	14,880	80,780	n/a	n/a
Charleston, SC	1,123,661	63,908	1,187,569	1,106,936	7.3
TX: Galveston, TX	440,492	49,820	490,312	485,684	1.0
Houston, TX	57,362	9,723	67,085	60,064	11.7
VA: Alexandria, VA	10,007	13,601	23,608	107,807	-78.1
Portsmouth, VA	939,862	240,316	1,180,178	1,229,787	-4.0
Yorktown, VA	1,577,154	623,628	2,200,782	2,090,495	5.3
WA: Port Angeles, WA	891,743	6,117	897,860	846,295	6.1
Seattle, WA	1,896,951	41,856	1,938,807	1,984,643	-2.3
WI: Milwaukee, WI	162,184	8,339	170,523	160,709	6.1
CONUS Totals	**$78,472,927**	**$7,364,741**	**$85,837,668**	**$83,354,717**	**3.0%**

* **Note:** U.S. Coast Guard Retail activities include grocery, package store and exchange sales.
Services & Other activities include gas stations, clubs and miscellaneous sales.
n/a Information not available.

Coast Guard NAFA Sales
(FY88)

Overseas

Alaska	FY88 $Sales Retail*	Services* & Other	Total	Total $ Sales FY87	Total Sales % Change 88 vs 87
Juneau, AK	477,219	103,532	580,751	463,563	25.3
Ketchikan, AK	619,140	35,186	654,326	663,972	–1.5
Kodiak, AK	4,793,812	1,219,744	6,013,556	6,287,949	–4.4
Sitka, AK	334,699	38,674	373,373	344,962	8.2
Alaska Totals	**$6,224,870**	**$1,397,136**	**$7,622,006**	**$7,760,446**	**–1.8%**
Hawaii					
Barbers Point, HI	0	102,010	102,010	65,888	54.8
Honolulu, HI	4,730,492	1,413,983	6,144,475	5,525,415	11.2
Hawaii Totals	**$4,730,492**	**$1,515,993**	**$6,246,485**	**$5,591,303**	**11.7%**
Italy					
Lampedusa	6,028	5,469	11,497	29,499	–61.0
Sellia Marina	44,465	0	44,465	35,150	26.5
Italy Totals	**$50,493**	**$5,469**	**$55,962**	**$64,649**	**–13.4%**
Puerto Rico					
Borinquen	5,468,306	596,614	6,064,920	6,280,147	–3.4
San Juan	2,909,271	311,062	3,220,333	3,204,905	0.5
Puerto Rico Totals	**$8,377,577**	**$907,676**	**$9,285,253**	**$9,485,052**	**–2.1%**
Spain					
Estaritt	39,571	0	39,571	48,553	–18.5
Turkey					
Kargabarun	10,778	0	10,778	8,640	24.7
West Germany					
Sylt	13,428	1,472	14,900	22,034	–32.4
Overseas Totals	**$19,447,209**	**$3,827,746**	**$23,274,955**	**$22,980,677**	**1.3%**

* **Note:** U.S. Coast Guard Retail activities include grocery, package store and exchange sales. Services & Other activities include gas stations, clubs and miscellaneous sales.

Coast Guard Totals

	FY88 $Sales Retail	Services & Other	Total	Total $ Sales FY87	Total Sales % Change 88 vs 87
CONUS	**78,472,927**	**7,364,741**	**85,837,668**	**83,354,717**	**3.0**
Overseas	**19,447,209**	**3,827,746**	**23,274,955**	**22,980,677**	**1.3**
Coast Guard Cutters	**226,682**	**74,316**	**300,998**	**315,884**	**–4.7**
Worldwide	**$98,146,818**	**$11,266,803**	**$109,413,621**	**$106,651,278**	**2.6%**

Navy Exchange Sales
(FY88)

Summary of Sales by Retail Department

Department/Dept. Code	CONUS $ Sales	%	Overseas $ Sales	%	Worldwide $ Sales	%	% Change 88 vs. 87
Candy & Confections/A-1	12,604,066	1.4	6,352,808	1.5	18,956,874	1.4	2.6
Tobacco & Smoking Accessories/A-2	89,412,601	9.8	15,065,953	3.6	104,478,554	7.9	2.3
Convenience Foods/A-4	36,526,175	4.0	22,226,672	5.3	58,752,847	4.4	6.4
Beverages (Beer & Soda)/A-6	63,888,387	7.0	28,996,472	6.9	92,884,859	7.0	21.7
Film & Accessories/A-7	7,249,109	0.8	3,032,136	0.7	10,281,245	0.8	-3.6
Records & Tapes/A-8	15,524,496	1.7	16,691,266	4.0	32,215,762	2.4	20.9
Distilled Spirits & Wine/A-9	59,418,853	6.5	13,101,980	3.1	72,520,833	5.5	176.9
Cameras & Photo Equipment/B-1	9,916,932	1.1	6,724,222	1.6	16,641,154	1.3	-7.5
Housewares/B-2	11,365,552	1.2	5,921,758	1.4	17,287,310	1.3	-3.8
Sporting Goods/B-3	13,108,324	1.4	7,784,783	1.9	20,893,107	1.6	4.1
Electrical Appliances/B-4	21,016,211	2.3	17,992,211	4.3	39,008,422	2.9	5.7
Consumer Electronics/B-5	70,783,955	7.8	64,992,628	15.5	135,776,583	10.2	3.6
Home Furnishings & Giftware/B-8	16,719,192	1.8	16,104,094	3.8	32,823,286	2.5	-1.4
Furniture/B-9	7,204,462	0.8	23,405,802	5.6	30,610,264	2.3	8.5
Luggage & Leather Goods/C-1	10,215,726	1.1	2,638,757	0.6	12,854,483	1.0	6.8
Stationery/C-2	16,161,459	1.8	4,926,936	1.2	21,088,395	1.6	5.0
Party Goods & Greeting Cards/C-3	10,931,290	1.2	4,557,723	1.1	15,489,013	1.2	9.2
Hardware & Pet Supplies/C-4	15,918,205	1.7	4,573,904	1.1	20,492,109	1.5	-2.6
Toys & Wheel Goods/C-5	15,802,327	1.7	10,207,049	2.4	26,009,376	2.0	1.8
Books & Periodicals/C-7	13,841,741	1.5	4,946,035	1.2	18,787,776	1.4	0.5
Auto Accessories/C-8	20,849,731	2.3	8,267,071	2.0	29,116,802	2.2	3.5
Garden Supplies & Outdoor Living/C-9	24,123,431	2.7	5,602,999	1.3	29,726,430	2.2	5.0
Toiletries & Drugs/D-1	38,478,640	4.2	13,223,453	3.1	51,702,093	3.9	2.0
Jewelry/D-2	23,900,629	2.6	14,120,466	3.4	38,021,095	2.9	6.4
Household Supplies/D-3	12,680,240	1.4	6,014,013	1.4	18,694,253	1.4	2.5
Watches & Accessories/D-4	15,210,468	1.7	6,191,197	1.5	21,401,665	1.6	4.6
Fragrances & Cosmetics/D-5	21,102,096	2.3	7,126,821	1.7	28,228,917	2.1	8.7
Men's Wear & Accessories/E-2	64,971,472	7.1	19,561,875	4.7	84,533,347	6.4	-1.2
Intimate Apparel/E-3	19,065,208	2.1	5,913,637	1.4	24,978,845	1.9	0.8
Domestics/E-4	15,612,217	1.7	7,221,562	1.7	22,833,779	1.7	6.3
Infants & Toddler's Wear/E-5	12,049,303	1.3	5,400,468	1.3	17,449,771	1.3	7.9
Family Shoes/E-7	24,743,670	2.7	8,394,826	2.0	33,138,496	2.5	14.9
Women's Ready to Wear/E-8	31,584,043	3.5	12,981,028	3.1	44,565,071	3.4	1.7
Fabrics & Sewing Accessories/F-2	0	0.0	1,756,430	0.4	1,756,430	0.1	-4.9
Girls Wear/G-1	8,098,744	0.9	2,827,024	0.7	10,925,768	0.8	3.7
Boys Wear/G-2	8,378,451	0.9	2,832,852	0.7	11,211,303	0.8	6.8
Department Sales Adjustments*							
All B Departments/B-6	0	0.0	2,008,972	0.5	2,008,972	0.2	-1.9
All C Departments/C-6	1,010,885	0.1	153,517	/a	1,164,402	0.1	4.2
All D Departments/D-6	0	0.0	67,636	/a	67,636	/a	-9.9
All E Departments/E-6	0	0.0	905,760	0.2	905,760	0.1	-13.5
Misc. Retail Departments/E-9**	1,110,610	0.1	1,513,404	0.4	2,624,014	0.2	-0.9
Retail Subtotals	**$860,578,901**	**94.6%**	**$412,328,200**	**98.2%**	**$1,272,907,101**	**95.7%**	**8.7%**
Uniforms & Accessories/E-1	49,294,961	5.4	7,584,877	1.8	56,879,838	4.3	-2.1
Retail Department Totals	**$909,873,862**	**100.0%**	**$419,913,077**	**100.0%**	**$1,329,786,939**	**100.0%**	**8.2%**

Note: Navy Exchange sales for FY88 are preliminary and unaudited.
/a Less than one-tenth of one percent.
* Represents sales that were rung up by smaller exchanges without a key for each department.
** These figures represent sales recorded on a single department key at the cash register at smaller exchanges.

Navy Exchange Sales
(FY88)

Summary of Sales by Service Department

Department	CONUS	Overseas	Worldwide	% Change 88 vs. 87
Barber Shop/J-1	10,909,497	2,309,805	13,219,302	10.1
Beauty Shop/J-2	2,383,006	1,441,140	3,824,146	6.0
Gasoline/Fuel/J-3	74,344,543	21,905,124	96,249,667	-4.4
Auto Services & Labor/J-5	5,828,094	2,333,529	8,161,623	6.5
Optical/K-2	7,741,912	1,179,373	8,921,285	2.2
Flower Shop/K-3	6,879,867	2,294,063	9,173,930	6.0
Food Service/K-4	56,118,112	28,153,546	84,271,658	-1.7
Laundry Dry Cleaning/M-1	15,989,563	4,715,130	20,704,693	10.2
Personalized Services/M-2	25,700,148	17,573,063	43,273,211	15.3
Vending Machines/M-3	67,010,809	16,582,273	83,593,082	5.8
Amusement Machines/M-7	12,466,888	2,539,825	15,006,713	250.0
Total Services	**$285,372,439**	**$101,026,871**	**$386,399,310**	**5.4%**
Navy Lodges	$11,233,613	$2,242,768	$13,476,382	8.9%
Navy Uniforms/L-1	20,226,601	4,003,173	24,229,774	9.8
Concession Sales	$100,202,909	$35,320,083	$135,522,992	-6.7%

Navy Exchange Sales
(FY88)

Auburn FSO

	Retail	Services	Concession	Total
Bangor, WA	10,663,467	4,852,940	3,958	15,520,365
Bremerton, WA	10,344,216	2,652,788	13,928	13,010,932
Seattle, WA	18,508,150	2,291,947	14,417	20,814,514
Whidbey Island, WA	17,982,261	5,940,428	1,489,681	25,412,370
Auburn FSO Totals	**$57,498,094**	**$15,738,103**	**$1,521,984**	**$74,758,181**

Corpus Christi Region

	Retail	Services	Concession	Total
Beeville, TX	1,574,525	603,827	46,302	2,224,654
Corpus Christi, TX	7,539,008	1,820,649	1,144,242	10,503,899
Kingsville, TX	1,498,548	584,551	60,239	2,143,338
Region Totals	**$10,612,081**	**$3,009,027**	**$1,250,783**	**$14,671,891**

Navy Exchange Sales
(FY88)

Davisville FSO

	Retail	Services	Concession	Total
Brooklyn, NY	1,128,928	59,555	7,510	1,195,993
Brunswick, ME	8,761,257	2,189,746	104,899	11,055,902
Cutler, ME	360,171	88,082	0	448,253
Davisville, RI	1,363,708	16,855	0	1,380,563
Mitchel Field, NY	10,484,123	595,371	43,596	11,123,090
New London, CT	27,655,070	6,599,160	2,246,939	36,501,169
Newport, RI	18,640,800	3,299,027	1,452,789	23,392,616
Portsmouth, NH	504,872	151,821	31	656,724
Scotia, NY	1,556,595	46,907	20,852	1,624,354
South Weymouth, MA	4,094,962	533,025	16,485	4,644,472
Staten Island, NY	1,276,010	131,205	10,084	1,417,299
Winter Harbor, ME	375,209	213,115	0	588,324
Davisville FSO Totals	**$76,201,705**	**$13,923,869**	**$3,903,185**	**$94,028,759**

Great Lakes Region

	Retail	Services	Concession	Total
Crane, IN	343,771	74,737	3,475	421,983
Glenview, IL	1,528,312	652,861	56,271	2,237,444
Great Lakes (NTC), IL	32,890,570	20,888,680	6,197,661	59,976,911
Great Lakes (NH), IL	722,031	1,405,923	40	2,127,994
Region Totals	**$35,484,684**	**$23,022,201**	**$6,257,447**	**$64,764,332**

Jacksonville FSO

	Retail	Services	Concession	Total
Athens, GA	2,028,587	352,826	12,977	2,394,390
Atlanta, GA	2,500,814	557,035	47,072	3,104,921
Beaufort, SC	585,457	383,914	23,642	993,013
Cecil Field, FL	8,070,494	3,399,761	2,043,469	13,513,724
Charleston (NRMC), SC	238,265	288,865	24,871	552,001
Charleston (NAVSTA), SC	16,623,397	5,394,000	3,015,903	25,033,300
Charleston (NWS), SC	6,450,798	1,584,337	1,233,392	9,268,527
Jacksonville, FL	30,378,243	7,803,169	2,476,292	40,657,704
Key West, FL	5,948,805	2,103,727	965,115	9,017,647
Kings Bay, GA	3,786,845	2,230,331	351,409	6,368,585
Mayport, FL	12,060,902	4,502,558	2,428,209	18,991,669
Orlando, FL	52,901,606	15,274,729	3,350,374	71,526,709
Jacksonville FSO Totals	**$141,574,213**	**$43,875,252**	**$15,972,725**	**$201,422,190**

Navy Exchange Sales
(FY88)

Mechanicsburg FSO

	Retail	Services	Concession	Total
Annapolis, MD	6,091,483	1,161,419	677,572	7,930,474
Arlington, VA	1,621,787	91,289	96,114	1,809,190
Bethesda, MD	12,205,410	3,950,734	2,303,701	18,459,845
Cheltenham (NCU), MD	845,581	45,051	0	890,632
Colts Neck, NJ	972,303	307,045	0	1,279,348
Dahlgren, VA	595,222	859,764	4,712	1,459,698
Indian Head, MD	365,081	133,443	1,007	499,531
Lakehurst, NJ	3,375,473	1,006,728	1,007	4,383,208
Mechanicsburg, PA	1,124,791	89,290	17,216	1,231,297
Patuxent River, MD	8,004,103	2,581,829	1,398,656	11,984,588
Philadelphia (ASO), PA	560,278	4,793	16,489	581,560
Philadelphia (NH), PA	235,456	125,382	0	360,838
Philadelphia (NAVSTA), PA	15,075,412	3,750,320	2,367,678	21,193,410
Warminster, PA	429,366	69,980	17,820	517,166
Washington (NYD), DC	1,155,140	2,482,842	55,261	3,693,243
Willow Grove, PA	5,047,268	616,891	185,791	5,849,950
Mechanicsburg FSO Totals	**$57,704,154**	**$17,276,800**	**$7,143,024**	**$82,123,978**

Norfolk FSO

	Retail	Services	Concession	Total
Chesapeake, VA	540,180	246,786	0	786,966
Little Creek, VA	40,024,250	6,511,065	556,079	47,091,394
Norfolk (AFH), VA	1,351,510	1,006,564	0	2,358,074
Norfolk (NB), VA	43,745,480	15,810,190	9,416,658	68,972,328
Norfolk (NUMOC), VA	3,776,892	0	0	3,776,892
Oceana, VA	18,214,434	4,924,377	2,132,822	25,271,633
Portsmouth (NH), VA	1,597,544	1,010,681	1,237,795	3,846,020
Portsmouth (NNS), VA	8,004,453	2,553,073	199,432	10,756,958
Sugar Grove, WV	164,817	57,634	0	222,451
Virginia Beach, VA	3,707,072	2,872,887	1,537,043	8,117,002
Yorktown, VA	1,828,227	918,647	0	2,746,874
Norfolk FSO Totals	**$122,954,859**	**$35,911,904**	**$15,079,829**	**$173,946,592**

Oakland FSO

	Retail	Services	Concession	Total
Alameda, CA	22,497,196	5,424,949	3,084,181	31,006,326
Concord, CA	584,985	436,418	0	1,021,403
Fallon, NV	2,395,680	1,979,963	31,464	4,407,107
Ferndale, CA	156,165	65,702	0	221,867
Lemoore, CA	9,499,992	4,464,434	1,634,130	15,598,556
Mare Island, CA	9,430,446	4,944,575	1,785,887	16,160,908
Moffett Field, CA	22,918,562	5,660,674	2,352,949	30,932,185
Monterey, CA	10,103,529	2,966,889	3,026	13,073,444
Novato, CA	6,738,500	1,826,557	94,417	8,659,474
Oakland (NH), CA	1,607,520	1,323,710	25,741	2,956,971
Oakland (NSC), CA	378,400	424,400	322,211	1,125,011
Skaggs Island, CA	135,705	132,566	5,979	274,250
Stockton, CA	1,348,300	363,170	128,884	1,840,354
Treasure Island, CA	4,746,681	2,108,608	434,426	7,289,715
Oakland FSO Totals	**$92,541,661**	**$32,122,615**	**$9,903,295**	**$134,567,571**

Pensacola Region

	Retail	Services	Concession	Total
Dallas, TX	9,035,057	1,287,373	859,914	11,182,344
Gulfport, MS	5,430,457	2,035,885	945,516	8,411,858
Memphis, TN	25,691,482	9,465,319	4,936,488	40,093,289
Meridian, MS	5,419,228	2,130,507	1,114,561	8,664,296
New Orleans, LA	8,893,540	2,556,601	153,762	11,603,903
Panama City, FL	1,394,286	230,914	22,933	1,648,133
Pasacagoula, MS	668,063	212,769	0	880,832
Pensacola (NAS), FL	31,554,850	7,280,946	2,134,429	40,970,225
Pensacola (NTTC), FL	1,205,167	1,292,500	27,419	2,525,086
Whiting Field, FL	3,223,746	1,567,129	1,569	4,792,444
Region Totals	**$83,480,819**	**$26,772,570**	**$9,336,677**	**$119,590,066**

San Diego FSO

	Retail	Services	Concession	Total
China Lake, CA	2,929,602	1,669,241	0	4,598,843
Coronado, CA	3,989,788	2,286,488	1,767,835	8,044,111
El Centro, CA	1,023,806	560,810	0	1,584,616
Imperial Beach, CA	7,023,720	2,604,096	35,433	9,663,249
Long Beach, CA	30,351,449	5,934,648	3,268,068	39,554,165
Miramar, CA	45,372,144	10,822,205	3,932,585	60,126,934
North Island, CA	19,565,557	9,491,134	5,169,518	34,226,209
Point Mugu, CA	4,740,328	2,041,696	1,418,291	8,200,315
Port Hueneme, CA	16,494,243	4,390,868	1,513,410	22,398,521
San Clemente Island, CA	294,884	70,752	0	365,636
San Diego (NMC), CA	2,761,670	1,103,031	1,395,603	5,260,304
San Diego (NS), CA	65,270,239	14,065,725	5,425,370	84,761,334
San Diego (NSSF), CA	2,216,912	1,420,702	1,156,085	4,793,699
San Diego (NTC), CA	20,200,776	15,675,879	4,342,905	40,219,560
San Diego FSO Totals	**$222,235,118**	**$72,137,275**	**$29,425,103**	**$323,797,496**

NAVRESSO Exchange Sales
(FY88)

Alaska

Store	Retail	Services	Concession	Total
Adak	$11,116,738	$2,524,631	$1,254,553	$14,895,922

Australia

Store	Retail	Services	Concession	Total
Exmouth, West Australia	$1,346,578	$340,449	$0	$1,687,027

Bermuda

Store	Retail	Services	Concession	Total
Bermuda (NAS)	$8,071,832	$1,172,485	$1,682,892	$10,927,209

Crete

Store	Retail	Services	Concession	Total
Souda Bay	$535,926	$25,362	$11,039	$572,327

Cuba

Store	Retail	Services	Concession	Total
Guantanamo Bay	$12,878,397	$4,598,468	$2,063,245	19,540,110

Hawaii

Store	Retail	Services	Concession	Total
Barbers Point	19,581,112	7,129,131	2,583,972	29,294,215
Honolulu	823,837	498,730	21,689	1,344,256
Kauai	1,489,982	263,871	0	1,753,853
Lualualei	335,463	259,398	0	594,861
Pearl Harbor	84,450,651	14,269,184	7,382,924	106,102,759
Hawaii Totals	**$106,681,045**	**$22,420,314**	**$9,988,585**	**$139,089,944**

Iceland

Store	Retail	Services	Concession	Total
Keflavik	$14,712,296	$4,528,145	$153,992	$19,394,433

Italy

Store	Retail	Services	Concession	Total
Gaeta	844,567	236,515	131,309	1,212,391
La Maddalena	1,678,387	114,247	97,231	1,889,865
Naples	26,639,634	5,161,391	2,971,471	34,772,496
Sigonella, Sicily	15,875,964	3,795,734	1,103,758	20,775,456
Italy Totals	**$45,038,552**	**$9,307,887**	**$4,303,769**	**$58,650,208**

Japan

Store	Retail	Services	Concession	Total
Atsugi	11,518,787	3,124,808	1,882,261	16,525,856
Sanno Hotel	4,626,495	198,179	20,488	4,845,162
Sasebo	6,643,135	1,834,200	107,042	8,584,377
Yokosuka	44,111,081	12,046,461	6,233,913	62,391,455
Japan Totals	**$66,899,498**	**$17,203,648**	**$8,243,704**	**$92,346,850**

Marianas Islands

Store	Retail	Services	Concession	Total
Guam (NS)	$45,370,540	$10,405,285	$3,564,850	$59,340,675

Newfoundland

Store	Retail	Services	Concession	Total
Argentia (NF)	$1,229,038	$319,867	$0	$1,548,905

New Zealand

Store	Retail	Services	Concession	Total
Christchurch	$551,134	$24,436	$0	$575,570

Philippines

Store	Retail	Services	Concession	Total
Cubi Point	5,463,539	2,921,708	178,719	8,563,966
San Miguel	1,993,360	728,930	3,594	2,725,884
Subic Bay	33,414,913	10,999,686	409,107	44,823,706
Philippines Totals	**$40,871,812**	**$14,650,324**	**$591,420**	**$56,113,556**

Portugal

Store	Retail	Services	Concession	Total
Lisbon	$799,803	$0	$0	$799,803

Puerto Rico

Store	Retail	Services	Concession	Total
Roosevelt Roads	20,561,820	4,819,582	2,051,724	27,433,126
Sabana Seca	2,611,366	295,488	0	2,906,854
Puerto Rico Totals	**$23,173,186**	**$5,115,070**	**$2,051,724**	**$30,339,980**

Spain

Store	Retail	Services	Concession	Total
Rota	$25,713,821	$6,772,185	$1,321,346	$33,807,352

United Kingdom

Store	Retail	Services	Concession	Total
Brawdy, Wales	1,251,320	213,386	20,665	1,485,371
Edzell, Scotland	2,589,388	637,433	12,394	3,239,215
Holy Loch, Scotland	5,086,199	599,459	54,193	5,739,851
London (NA), England	1,111,358	325,100	54	1,436,512
Machrihanish, Scotland	333,915	53,932	23	387,870
St. Mawgan, England	364,128	127,881	725	492,735
Thurso, Scotland	611,211	91,252	0	702,463
West Ruislip, England	3,575,363	486,605	895	4,062,863
United Kingdom Totals	**$14,922,882**	**$2,535,048**	**$88,949**	**$17,546,879**

West Indies

Store	Retail	Services	Concession	Total
Antigua	$692,474	$107,575	$0	$800,049

Navy Totals

Navy	FY88 $Sales				Total $ Sales FY87	Total Sales % Change 88 vs 87
	Retail	Services	Concession	Total		
CONUS	**900,287,388**	**283,789,616**	**99,794,052**	**1,283,871,056**	**1,220,070,826**	**5.2**
Overseas	**420,605,552**	**102,051,179**	**35,320,068**	**557,976,799**	**518,344,428**	**7.6**
Worldwide	**$1,320,892,940**	**$385,840,795**	**$135,114,120**	**$1,841,847,855**	**$1,738,415,254**	**5.9%**

Marine Corps Exchange Sales
(FY88)

CONUS

Store	FY88 $Sales			Total $ Sales FY87	Total Sales % Change 88 vs 87
	Direct	Indirect	Total		
Albany, GA	4,582,591	191,131	4,773,722	4,756,256	0.4
Barstow, CA	1,835,822	379,995	2,215,817	2,458,338	-9.9
Beaufort, SC[1]	5,240,013	382,504	5,622,517	4,934,098	14.0
Camp Elmore, VA	5,462,690	439,401	5,902,091	6,079,698	-2.9
Camp Lejeune, NC	63,225,538	8,069,331	71,294,869	70,681,204	0.9
Camp Pendleton, CA	63,485,637	11,778,246	75,263,883	70,708,407	6.4
Cherry Point, NC	21,953,865	3,511,778	25,465,643	25,132,168	1.3
El Toro, CA	34,707,833	3,851,299	38,559,132	38,391,588	0.4
Henderson Hall, VA	19,668,727	1,585,009	21,253,736	18,338,161	15.9
Parris Island, SC	19,295,841	2,301,724	21,597,565	21,209,775	1.8
Quantico, VA[2]	38,122,032	2,779,248	40,901,280	39,006,234	4.9
San Diego, CA	30,260,536	2,014,326	32,274,862	30,987,097	4.2
Twentynine Palms, CA	22,033,278	813,275	22,846,553	21,357,762	7.0
Yuma, AZ	8,202,735	1,366,562	9,569,297	8,335,971	14.8
CONUS Totals	**$338,077,138**	**$39,463,829**	**$377,540,967**	**$362,376,757**	**4.2%**

[1] Beaufort established in FY88

[2] Quantico figures are for the retail operations after consolidation Comparison to the same period of FY87 is of no value

Overseas

Store	FY88 $Sales			Total $ Sales FY87	Total Sales % Change 88 vs 87
	Direct	Indirect	Total		
Guantanamo Bay, Cuba	4,438,806	144,217	4,583,023	3,953,396	15.9
Iwakuni, Japan	11,322,100	5,759,219	17,081,319	18,800,263	-9.1
Kaneohe Bay, HI	32,594,477	3,837,336	36,431,813	34,437,918	5.8
Rodman, Panama	4,280,644	756,982	5,037,626	5,514,997	-8.7
Overseas Totals	**$52,636,027**	**$10,497,754**	**$63,133,781**	**$62,706,574**	**0.7%**

Marine Corps Totals

	FY88 $Sales			Total $ Sales FY87	Total Sales % Change 88 vs 87
	Direct	Indirect	Total		
CONUS	**338,077,138**	**39,463,828**	**377,540,966**	**362,376,757**	**4.2**
Overseas	**52,636,027**	**10,497,754**	**63,133,781**	**62,706,574**	**0.7**
Worldwide Totals	**$390,713,165**	**$49,961,582**	**$440,674,747**	**$425,083,331**	**3.7%**